

BSD SpecLink-E Installation Instructions For Professional and Corporate Editions

BSD SpecLink-E (SLE) can be installed on a standalone computer for individual use or on a network for multiple users. The setup package offers one standalone option and three network configuration options. All the network options also require the Client Software Setup for each workstation on which the software is to be used. The following sections describe how to go about performing each type of setup. If further assistance is needed, please call BSD technical support at 1-800-266-7732, or consult BSD's web site (www.bsdssoftlink.com).

SpecLink-E Beta Users: *It is particularly important that you uninstall the Beta 2 release before attempting to install this release.* See below under "Before Starting the Installation".

SpecLink-E Professional Users: *If you are upgrading a SpecLink-E Professional installation to Corporate Edition, BE SURE TO BACKUP YOUR DATABASES before beginning the upgrade.* See below under "Before Starting the Installation"

Hardware/Software Requirements and Recommendations

| | Standalone Configuration | Server/Workstation Configuration | |
|-----------------------------|-------------------------------------------------|----------------------------------------------------------------|-------------------------------------------------|
| | (Both server and client) Laptop or Desktop | Network Server | Workstations Laptop or Desktop |
| Internet Connection | Required | Required | Required |
| Browser | Internet Explorer 6.0 SP1 or higher | Not required | Internet Explorer 6.0 SP1 or higher |
| Processor | Intel-compatible processor, 2 GHz or better. | | |
| Operating System | Windows XP, Vista, or Windows 7 (32- or 64-bit) | Windows Server 2008 or Windows Server 2003 SP2 (32- or 64-bit) | Windows XP, Vista, or Windows 7 (32- or 64-bit) |
| RAM | 4 GB or more | 4 GB or more | 2 GB or more |
| Minimum Required Disk Space | 10 GB | 10 GB | 1 GB |
| Monitor Resolution | XGA or better | XGA or better | XGA or better |
| DVD | Needed if setup is not downloaded. | | |
| Printer | Laser printer or PDF writer | Not required | Laser printer or PDF writer |

Before Starting the Installation

Administrative Rights: Administrator rights are required for installation of all versions of the SpecLink-E server software. Administrator rights are NOT required for setting up each client computer (see Client Software Setup below).

Uninstalling Beta 2 Software. If you have installed a Beta version of SpecLink-E it must be uninstalled before installing this production version of the software and data. Uninstall "BSD SpecLink-E Server Components" and reboot before installing the new version. Contact BSD support before uninstalling if you wish to preserve any data created with the Beta 2 software.

Uninstalling the Professional Edition. You will need to uninstall Professional Edition server before you can install the Corporate Edition server. Before you begin, be sure to backup your databases using the Backup Databases command on the left side of the Tools tab of the ribbon bar, and note the location of the resulting backup file. You can run Add/Remove programs (Programs and Features in Windows Vista) to remove the Professional Edition server. If you will be installing the Corporate Edition server to the same location you do not need to move or delete the Client Setup Package. Please reboot this computer after uninstalling the Professional Edition.

Internet Connection. A connection to the Internet is required for successful installation. A test will be made for a connection at the beginning of the setup.

Storage Requirements. The servers or standalone computers used by SLE are **REQUIRED** to have a minimum of 10GB of disk space available to perform the initial install of the SLE Server components. BSD recommends that 4 GB of disk space be allocated for the SLE Projects database on an ongoing basis. The SLE Master database requires at least 250MB and will grow over time.

Standalone Computer Setup (Option 1)

NOTE: Option 1 is not appropriate for installation of SpecLink-E Corporate, since it results in a single user configuration. See Network Setup Options 2, 3, and 4 below for appropriate setup options. While not recommended, it is possible to install the Corporate Edition in the Standalone configuration.

Use the standalone setup if only one computer will be used to run the software and no access to that computer is required from other computers. Otherwise, to install for multiple computers skip to the Network Setup described below.

Use the standalone setup if only one computer will be used to run the software and no access to that computer is required from other computers. If you intend to also install BSD's LinkMan-E software and run Autodesk Revit on other than this computer you cannot use this setup. For this and this and all other multiple computer setups skip to the Network Setup described below.

The Standalone setup is identified as Option 1 in the setup process and includes all components necessary for operation of the software. The setup prompts for a location for the databases and the client setup package installation - the default locations are:

- Database default location: C:\Program Files\Building Systems Design\Data
- Client setup package default location: C:\SLE Client Setup

If there is more than one hard drive or other writable media drive attached to the Standalone computer, you could choose to locate either the data or the client setup package (or both) on a different drive.

NOTE: This setup **REQUIRES** 10 GB of free disk space to begin the initial install.

NOTE: Microsoft .NET framework 3.5 will be installed during the setup if not already present, as will Microsoft Windows Installer 4.5 (MSI).

NOTE: you will be asked to restart the computer after MSI is installed; please do so immediately. The installation will proceed automatically following restart of the computer.

No further software installation is necessary. Skip to "Starting the Software", below.

Network Setup (Options 2, 3 and 4)

Network setup is used for local area networks (LANs), wide area networks (WANs), virtual private networks (VPNs), or peer-to-peer networks. Network setup has two configurations, based on where you choose to locate the two major components of the package (the data and the client setup package). For instance, you can 1) have all the components located on the same server (or shared workstation) or 2) put the data on a more secure, less accessible server, with the client setup located where it can be more widely accessed for workstation setup.

The components of a network setup include the following:

- A client setup package, used to install the end user computer software
- The SLE databases, used as a data foundation for all software functionality
- A run-time copy of Microsoft SQL Server 2008 R2 database management system
NOTE: If another application has installed the previous release of SQL 2008, it will be updated to the 2008 R2 release during BSD SpecLink-E installation. This is by Microsoft design.
- A set of BSD server files, used to establish system services
- Microsoft .NET framework 3.5 SP1 on server and client setup computers and framework 2.0 on client computers, if not already available. In Windows Server 2008 R2, NET framework 3.5 must be enabled via Roles selection prior to installation of SLE.
- Microsoft Windows Installer 4.5 (MSI), if not already available. Note: you will be asked to restart the computer after MSI is installed; please do so immediately. The installation will proceed automatically following restart of the computer.

Option 2, Network Setup – Complete

Option 2 installs all components listed above to a single network server or shared workstation, and the install must be run locally on that computer. Before installation, create, map and share a folder for the client setup package on the target server.

The setup prompts for:

- Location for the databases (Default location: C:\Program Files\Building Systems Design\Data)
- Location for the client setup package installation (Default location: C:\SLE Client Setup). [That location must be shared so that all users on the network can see it, once the setup is complete.]
- The computer name (use the default for option 2)
- Port number used for communication between BSD applications (defaults to 9047).

File and print sharing, as well as the port number may need to be set up on the server firewalls on this computer.

When "Option 2, Network Setup - Complete" is complete, skip to "Client Software Setup" below. The installation is not complete until at least one workstation has been configured as a "Client" and Registration has been completed as described below.

Option 3, Network Setup - Servers & Data Only

Option 3 is used when it is necessary to install the databases and the client setup package on different servers or shared workstations. This may be desirable because the system used to store the

client setup package must be accessible to all users, and may need to be isolated from the system used for databases.

This option must be run locally on the target computer.

Setup prompts for a drive location for the databases.

File and print sharing, as well as the port number defined in option 4 below must be set up as exceptions in any firewalls on this computer.

When "Option 3, Network Setup -- Servers & Data" is complete, continue to Option 4, Client Setup Package. Option 3 is not complete without Option 4.

Option 4, Network Setup – Client Setup Package Only

Option 4 is used when it is desirable to install the client setup package on a separate server or shared workstation from the rest of the network files. Note that option 3 must also be carried out separately before the system is ready to operate.

The setup prompts for:

- The location of the client setup package, defaulting to C:\SLE Client Setup. That location must be shared and mapped prior to installation. . You will need to choose a network drive or network share that is accessible to each user that will be running the SLE client software.
- The computer name used to store the remaining network files (this is the server computer name in Option 3).
- The port number used for communication (defaults to 9047).

Enable shared permissions on the client setup folder.

After "Option 4, Network Setup - Client Setup Package Only" is complete, continue to "Client Software Setup" immediately below. The installation is not complete until at least one workstation has been configured as a "Client" and Registration has been completed as described below.

Client Software Setup

Each workstation from which you wish to run the software must have the Client Software installed. The Standalone Setup automatically installs the Client Software since it knows and is running on the target computer but the Network Setup does not. If you have performed the Standalone Setup, skip this section completely.

The Client software is a separate application that runs on each individual user's computer, using the master databases stored on a server or shared workstation. The software is designed to be run on a local area network, a wide area network, and /or using a virtual private network (VPN) over the Internet.

To start the Client Software Setup, the workstation must have access to the location of the client setup package established during the network setup. Perform the Client Software setup by running **setup.exe** from that location.

The setup will install client software on the user's computer in a Microsoft-approved location within the user's Local Settings directory. Among other things, this greatly simplifies installation, improves

security, and obviates the need for administrative privileges during installation and updating processes.

Note for IT Personnel: Once the Client Software Setup package is installed on your server, you can simply send a link to its setup file location by email to each user of a workstation where SLE is to be used. They simply click on the link to set up their workstation -- thereafter, whenever there is an update to the client software package, the client software will update itself.

Starting the Software

The client software starts automatically after setup is complete. Also, the setup will have placed an entry for SpecLink-E under Building Systems Design, Inc. in the Windows Start Menu. If you have a green 'ON' sign in the bottom right border of the main window, all is well and you are up and running. See the next paragraph, "Troubleshooting", if you don't see the green 'ON' sign. SpecLink-E will display a page from BSD's website on the My Start Page tab when it first starts up. My Start Page lets you browse BSD's website (and other locations) from within the SpecLink -E application.

Troubleshooting: If when the SLE Client software opens, you receive a message that the user could not be validated and/or a connection to the server could not be found, or if the Ribbon Bar menu is grayed out and there is a red "OFF" sign in the bottom right border of the main window, it is possible that the client has not obtained the correct location of the server. Make sure you have installed the server. If you know how to access the Services running on the server or on the standalone computer, you can verify that the BSD Server service status is "Started". If not, attempt to start it by right-clicking on it and choosing Start. If you still have problems, please call BSD Support at 1-800-266-7732 to get help.

Registration

During startup of the software for the first time the user will encounter a Registration dialog that requires the Electronic ID (EID) representing the user's license purchase. This is entered into the system by clicking on the Register Online button. The correct EID will validate the purchase and license and unlock the data. If you don't yet have an EID you can come back to this dialog later by clicking on the OK button to continue. You can reach the Registration dialog later via the Tools Tab. Until the registration is complete and valid, the software will continue to prompt for it and the data will not be unlocked. Once the software is properly registered, subsequent users will not encounter the registration notice.

Working Disconnected

SpecLink-E is "Smart Client" software. The term alludes to the standalone nature of the Client application; the Client runs separately from the Server and allows you to edit and print documents while disconnected from the server and its hosting network. This means you can take a laptop with the Client software home or on the road and continue to work on those documents that you checked out before you left the office.

Updating

After the initial install of the client software by the end user, updates are handled automatically. Each client software instance checks its installation package location each time it starts. When an update arrives from BSD either by download or CD/DVD, it can be installed to the network server at the

system manager's discretion. When the client software discovers the new package on its next startup, it basically replaces itself with the new version and restarts. Even on slow networks this update is typically completed in one to two minutes. No administrator login or other support is required and the process is virtually transparent since no input is required of the user on either initial or subsequent installs.

Updating the Server and Standalone Installations. To update the network installation or the standalone computer installation, run the same option or options used to install the original software. This will update the server services files and the client setup package with the latest files.

Updating the Client Software. The client software automatically checks the client setup package each time it starts up. If the client setup package has been updated (above) the client software updates and restarts itself. The user does not need to do anything else.

Uninstalling the Professional Edition Software.

IMPORTANT NOTE: before uninstalling the server components, make a backup copy of the database files using "Backup Databases" on the Tools tab selection.

If BSD LinkMan-E has also been installed on this computer, please uninstall it before performing the SLE uninstallation.

Before uninstalling the BSD SpecLink-E server components or a standalone installation, call BSD Technical Support at 1-800-266-7732 to maintain your license to install the software elsewhere. To uninstall the SpecLink-E Client software, at the user's computer open Add/Remove Programs (or Programs and Features on Windows Vista), choose to uninstall the entry named "BSD SpecLink-E", and confirm that you want to remove the application from this computer.

To un-install the server components, open Add/Remove Programs, click on "BSD SpecLink-E Professional Server Components" and choose to uninstall. This removes most server and data components, but does not remove the SpecLink-E Client Setup package. You can safely remove this package by deleting the directory in which it is installed. If you used the default location this would be the C:\SLE Client Setup directory.

Note that if you are uninstalling a standalone installation, you need to perform the un-install for both the server components and the client application.

Uninstalling the Corporate Edition Software.

IMPORTANT NOTE: Before uninstalling the server components, make a backup copy of the database files using "Backup Databases" on the Tools tab selection.

If BSD LinkMan-E has also been installed on this computer, please uninstall it before performing the SLE uninstall.

Before uninstalling the BSD SpecLink-E server components or a standalone installation, call BSD Technical Support at 1-800-266-7732 to maintain your license to install the software elsewhere. To uninstall the SpecLink-E Client software, at the user's computer open Add/Remove Programs (or Programs and Features on Windows Vista), choose to uninstall the entry named "BSD SpecLink-E", and confirm that you want to remove the application from this computer.

To uninstall the server components, open Add/Remove Programs, click on “BSD SpecLink-E Professional Server Components” (or “BSD SpecLink-E Corporate Server Components”, depending on the version) and choose to uninstall. This removes most server and data components, but does not remove the SpecLink-E Client Setup package. You can safely remove this package by deleting the directory in which it is installed. If you used the default location this would be the C:\SLE Client Setup directory.

Once you have performed the above steps for SLE Corporate installations, you must perform the following to uninstall SQL Server 2008 Standard:

1. Start uninstall of “Microsoft SQL Server 2008” in Control Panel.
2. When prompted, click on Remove.
3. Click on OK.
4. When prompted, select instance “BDSOFTLINK\$DATA” from the pull-down list.
5. Click on Next.
6. When prompted, check boxes for “BDSOFTLINK\$DATA” Database Engine Services and Shared Features “SQL Client Connectivity SDK.”
7. Click on Next.
8. Click on Next again.
9. Click on Remove.
10. When SQL removal is complete, click on Next, then Close.

The previous actions will have removed the following items from the installed programs list: “Microsoft SQL Server 2008 Browser”, “Microsoft SQL Server 2008 Setup Support Files”, and “Microsoft SQL Server VSS Writer.”

Note that if you are uninstalling a standalone installation, you need to perform the un-install for both the server components and the client application.

END