

Installing ProjectSpec from the ProjectMatrix DVD to A Network

System Requirements

Operating System: XP, Vista, Windows 7 (32-bit or 64-bit) CPU: Pentium/ 100 MHz RAM: 64 MB (minimum) Hard Drive: 52 MB (Free space. More, depending on catalogs installed) Resolution: 800 x 600 / 256 Colors (minimum) Peripherals: Windows compatible printer or plotter (optional) Product Sold As: Site License or Seat License (Annual Subscription Fee)

Before you begin...

What is ProjectSpec?

ProjectSpec simplifies the specification process by quickly creating a parts list with options, prices, and discounts. You can easily produce bids and proposals for customers. Create invoices and purchase orders and even export into various accounting systems. You can visit our website (<u>www.projectmatrix.com</u>) to see a listing of all the manufacturers that are supported in ProjectSpec.

You must install ProjectSpec on every computer. However, the catalogs can be installed on a shared drive or a network drive. ProjectSpec and the Catalogs can also be downloaded from our website at <u>www.projectmatrix.com/downloads.html</u>.

Authorization Code

You must call ProjectMatrix at 513.554.1665 to get your license code for ProjectSpec. You will have to enter your authorization code the first time you run the program. This code will be valid for one year. You will get a warning 30 days in advance that your license code is going to expire.

Installing Manufacturer Pricing Catalogs to a Network Using the ProjectMatrix DVD

- 1. Insert the ProjectMatrix DVD and click the "ProjectSpec and Catalogs" button.
- 2. Click the "ProjectSpec Electronic Catalogs" button.

A ProjectMatrix Main Setup	A ProjectSpec Installation
This DVD contains all ProjectMatrix installations.	Note: When button says "Update" reinstall program and/or data to be on the latest version or to view latest information.
Click Here	
ProjectSymbols ProjectSpec and Catalogs	ProjectSpec ProjectSpec Utilities Electronic Catalogs
	NERSEAL RECEIPTION
ProjectTools Project Workspace	Ne w s Manufacturer Help Notes
Additional information can be obtained from:	Incremental symbol updates can be obtained from:
www.projectmatrix.com	www.projectmatrix.com
Exit	Exit

- 3. On the Welcome screen, click "Next" to continue.
- 4. Review the License Agreement and click "Yes" to continue.
- 5. The "What's New?" window will appear with information about the catalogs that have been updated and changed since the last distribution. Click "Next".
- 6. <u>This next screen is very important.</u> "ProjectSpec Catalogs Installation". Here you will choose which catalogs to install and where they will be installed. To choose which catalogs you want to install click on each catalog name on the left so that the catalog shows a gray hard drive icon beside it. Any catalog with a red X beside it will not be installed. To install all the catalogs simply click the "All on Disk" button in the bottom left hand corner of the window.

You need to choose where on your network the catalogs will be installed. Choose the "Set All Mfg" button to make sure that all of the catalogs that you choose are being installed to the same location.

ProjectSpec Catalogs Installation AFF - AIS ALL - ALLSTEEL INC. AMS - AMERICAN SEATING USA ART - ARTOPEX BLA - BASYX BLD - BOLD FURNITURE BRE - BRETFORD BRE - BRETFORD BRE - BRETFORD BRE - BRETFORD CAL - GRONOMIC SOLUTIONS FG - FIRST OFFICE GL - GEI - GEIGER GL - GROUPE LACASSE AA - GROUPE AA	Manufacture: AIS Product Line: N/A Catalog Size: 554KB Last Updated: 3/2009 Catalog Path: C:\CATALOGS\ Space available on drive C: 2232476KB Total space required: 139896KB LEGEND: Image: Catalog on hard drive. Image: Mfg. / catalog on hard drive. Image: Mfg. / catalog will be deleted. Image: Mfg. / catalog not installed. Image: Various catalog states; mixed. Image: Do Nothing; leave as is. Image: Do nothing; leave as is. Image: Open installed catalogs automatically Next
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7. It is highly recommended that you make a directory called "Catalogs" in the root of your network drive and install all of your catalogs and configuration files to this directory. In the following example the catalogs will be installed to drive Z. Once you have created your path, click "Open".

실 Select Cata	logs Root Path	own line West			(
Look in: 💂	Z:\	•	누 主	➡ 🖩 🍋	
Name	*	Date modified	Туре		<u>^</u>
				L	
					_
•				F	·
Folder:	Z:\CATALOGS			Open]
Files of type:	Show Folders On	ly	•	Cancel	

- 8. Confirm that the "Catalog Path" now reads the correct path and click the "Next" button.
- 9. In this next window you will be choosing the directory for the PSCataologsInstalled.INI file. This file is very important. It is recommended that the Installed Catalogs Information File resides on the same network drive as the catalogs. It is recommended that this location be the root of the catalog directory. Ex. Z:\Catalogs. Click the "Browse" button to set the location for the file.



10. Select the path for this file and click "Open". Then verify that the path is correct on the "ProjectCatalogs Setup" screen and click "Next".

Select Folder	1			X
Look in: 🚺	CATALOGS		-	➡ 📰 🕶
Name	Date taken	Tags	Size	» ^
				-
Folder:	Z:\CATALOGS\	-	_	Open
Files of type:	Show Folders Only	/	•	Cancel

11. The installation will now install all of the catalogs to the selected network drive. Please wait patiently until this finishes. There are a couple catalogs that are password protected. Simply follow the instructions that pop up for these catalogs.

When the catalogs are finished installing, you may move on to the next section of this guide to install the ProjectSpec program.

Note: If your network has strict user rights permissions you may need to do some additional setup. Make sure that anyone using the catalogs from the network drive has full read/write access to the PSCatalogsInstalled.INI file. If a user does not have access to this file the catalogs will not be accessible from their machine.

Note: If a user's computer is using virus protection software that has real-time scanning capabilities, it is recommended to configure it to not scan the catalogs directory. Some virus protection software can significantly slow down ProjectSpec when searching your catalogs or pricing your files.

Installing ProjectSpec on each user's machine

Note: If ProjectSpec is already currently installed on the computer it does not need to be reinstalled. Simply go to step 10 and follow the instructions to the end.

- 1. Insert the ProjectMatrix DVD and click the "ProjectSpec and Catalogs" button.
- 2. Click the "ProjectSpec" button.

ProjectMatrix Main Setup	ProjectSpec Installation
This DVD contains all ProjectMatrix installations.	Note: When button says "Update" reinstall program and/or data to be on the latest version or to view latest information.
ProjectSymbols ProjectSpec and Catalogs	Click Here Click Here ProjectSpec Electronic Catalogs
	UNDER CONTROL OF
ProjectTools Project Workspace	Ne w s Manufacturer Help Notes
Additional information can be obtained from:	Incremental symbol updates can be obtained from:
www.projectmatrix.com	www.projectmatrix.com
Exit	Exit

- 3. On the Welcome screen, click "Next" to continue.
- 4. Review the License Agreement and click "Yes" to continue.
- 5. The "What's New?" window will appear with information about any changes made to ProjectSpec and the current version number. Click "Next" to continue.
- You should now be at the ProjectSpec4 Destination screen. We recommend that you keep the Destination Folder set to the default directory. Click "Next" to continue.
- 7. If you do not want the installation wizard to create a "Start Menu" shortcut or a "Desktop Icon" then de-select the check boxes next to them. Click "Next" to continue.
- 8. Click "Next" to accept the default location for the ProjectSpec Icon.
- 9. Confirm all of your settings are correct and click "Next" to continue. The installation wizard will then proceed to install ProjectSpec on your computer. When it is finished you will receive an "InstallShield Wizard Complete" screen. Select "No, I will restart my computer later" and click "Finish".
- 10. ProjectSpec should now be installed on your computer. Run ProjectSpec by clicking the icon on the desktop.



11. If this is the first time ProjectSpec has been installed on the system you will be prompted to enter your license code. This code should have been provided to you through email when you purchased the product. If you don't have your code please contact us at 513.554.1665 to acquire a code.

ProjectSpec							
Your ProjectSpec license has expired. You must contact ProjectMatrix, Inc. at (513) 554-1655 to obtain an updated code.							
ProjectSpec may be run in demo mode by clicking the 'Demo' button. This will allow full use of ProjectSpec, except the print and save functionality.							
Please enter code:							
OK Demo Cancel Help							

Once you have successfully entered your license code and clicked "OK", you will be prompted to register the product. Click "Register Online" once all fields are filled in.

12. Once you are in ProjectSpec, go to your "Tools" pull-down menu and select "Preferences".



13. In the Preferences dialog window first choose the "File Paths" tab. Expand the Installed Catalogs Information File and highlight the path. Click the "Browse" button to set the new path for the PSCatalogsInstalled.INI file.

Preferences	
Format File Paths ProjectSpec Catalog Viewer	
Paths:	Browse
Search File Directory Print Templates Directory	Add
Calculator Error File Viewer	Remove
Installed Catalogs Information File C:\CATALOGS\PSCatalogsInstalled.ini C:\CATALOGS\PSCatalogsInstalled.ini	Move Up Move Down
E	Move Down
OK	cel Help

15. Browse to the network drive where you installed the ProjectSpec catalogs. Select the PSCatalogsInstalled.INI file and click OK.

Browse for Files or Folders	×
Browse for Installed Catalogs Information File	
MWL.DEF	*
MWL.exe	
MWL.KEY	
MWL.OPT	
MWL.TOC	
▷ 🛄 MWL.zip	
PSCatalogsInstalled.INI	
compose.prj	
⊳ 🍌 Config.Msi	
Documents and Settings	
🛛 🕞 🎽 Google	-
ок Са	incel

16. Confirm that the "Installed Catalogs Information File" is now set to the network drive path and click OK.

Preferences	
Format File Paths ProjectSpec Catalog Viewer	
Paths:	
	Browse
	Add
Calculator	Remove
Installed Catalogs Information File	Move Up
🧭 Default Pictures Directory	Move Down
OK	ncel Help

17. Go to the "Tools" pull-down menu and select "Catalog Manager".

🕼 Project	tSpec4 - [ProjectSpec1	1]					
🕼 <u>F</u> ile	<u>E</u> dit <u>V</u> iew <u>P</u> rice	<u>O</u> ptions	<u>T</u> oo	ls	<u>W</u> indow	<u>H</u> elp	
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Title				<u>P</u> ro	ojectInfo		
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				Ca	talog <u>M</u> ana	ger 🎽	-
	Option Codes			Pre	e <u>f</u> erences	1	5
			_		Tag	5	

18. When the "Catalog Manager" opens confirm that your paths are correct and activate the catalogs that you will be using. Click the "Close" button when you are finished.

Manufacturers/Catalogs	Paths	Available	Open	Active 🔺	Close
E⊢ MANUFACTURERS					
🗗 🗙 AIS					Expand All
- 🚍 A02 - A0 TYPE 2	Z:\CATALOGS	W	4	\mathbf{X}	
- 🖃 DIV - DIVI	Z:\CATALOGS	W	4	\mathbf{X}	Collapse All
- 🖃 MWL - MWALL	Z:\CATALOGS	W	4	XXXX	
🗆 📼 MTX - MATRIX SERIES	Z:\CATALOGS	W	4	\times	Set Path
🕂 🗹 ALLSTEEL INC.					
- 🚍 A26 - TERRACE 2.6	Z:\CATALOGS\ALL	W	4		Open Catalo
— 🚍 A30 - Align Panel	Z:\CATALOGS\ALL	W	4		Close Catalo
— 🚍 A31 - Align Wood Desking	Z:\CATALOGS\ALL	Ŵ	[]		
— 🚍 A32 - Align Metal Storage	Z:\CATALOGS\ALL	W	4		Activate
— 🚍 A33 - Align Wood Storage	Z:\CATALOGS\ALL	W	4		
— 🚍 A48 - Allsteel Express Cha	Z:\CATALOGS\ALL	W	4		Deactivate
— 🚍 HRC - Concensys	Z:\CATALOGS\ALL	W	4		Move Up
- 🖃 HTR - Terrace	Z:\CATALOGS\ALL	W	4		Move op
— 🚍 AHD - Allsteel / Ahrends	Z:\CATALOGS\ALL	Ŵ	4		Move Down
— 🚍 HES - Express Solution	Z:\CATALOGS\ALL	Ŵ	[]		
— 🚍 ALF - Files	Z:\CATALOGS\ALL	W	4		Add Catalog
- CALG - GET SET Product	Z:\CATALOGS\ALL	W	4		
— 🚍 ALC - Seating	Z:\CATALOGS\ALL		(A)		Delete Catalog
— 🚍 ATM - Merge Tables	Z:\CATALOGS\ALL		4		
— 🚍 AMG - Allsteel Reach	Z:\CATALOGS\ALL		(Undete Cotolo
— 🚍 AWS - Allsteel Worksurfa	Z:\CATALOGS\ALL		4		Update Catalo

www.projectmatrix.com

19. Your ProjectSpec should now be set up properly for sharing the catalogs across the network.

Note: For ProjectSpec to run properly users must have at least <u>Power User</u> rights on their computer. If you need to set customized rights for your users please email <u>support@projectmatrix.com</u> to get a list of files and permissions for the software to run properly.

Updating your ProjectSpec catalogs

You can update all of your catalogs from any of the user's computers as long as they have read/write access to the catalog directory you have set up on your network.

Note: It is recommended that when you do this process that you choose one of the user's computers and do it from that computer each time. Also it is highly recommended to make sure that the catalogs are currently not in use by any of the other computers on the network when running the update.

1. Go to the "Help" pull-down menu in ProjectSpec and click "Check for Catalog Updates".

🕼 Project	tSpec4	- [Proje	ectSpec1]		-					
🕼 <u>F</u> ile	<u>E</u> dit	<u>V</u> iew	<u>P</u> rice	<u>Options</u>	<u>T</u> ools	<u>W</u> ind	low	<u>H</u> el	p	
i 🗋 💕		% 🖻	B 9	୯ 🛛 🖸	3 🥔	-\$-	\$ 3		<u>H</u> elp Topics	F1
Title									Check For Newer ProjectSp	ec Version
	_				_				Check for <u>C</u> atalog Updates	*
Rec#	Mfg		Qty	Part Nu	mber		Tag		Enter New License Code	13
	Part	Descrip	otion			-	Tag 3	0	<u>A</u> bout ProjectSpec4	

2. The "Catalog Updates" window will appear. This window will display all of the catalogs that need updated and all of the catalogs that are current. Simply press the "Update Now" button and all of the catalogs that are not current will be updated.

Note: You must have access to the internet to update catalogs from this window.