Installing
# ProjectSpec™

from the 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 (www.projectmatrix.com) to see a listing of all the manufacturers that are supported in ProjectSpec.
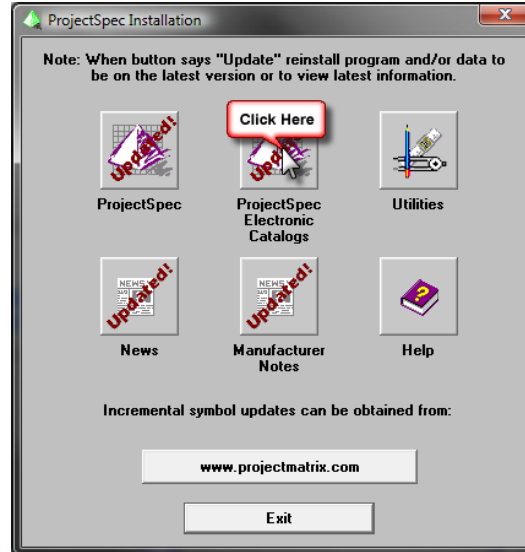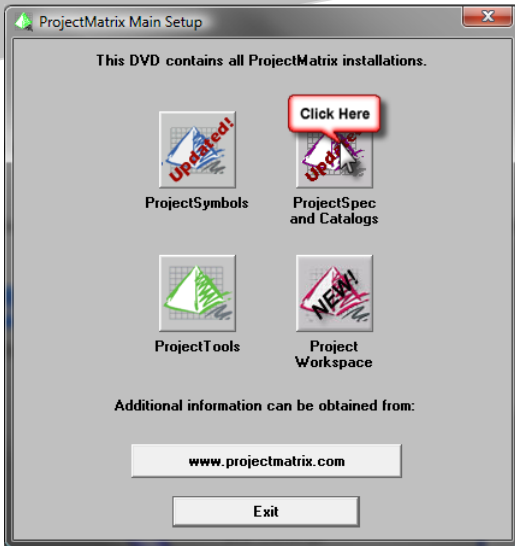
You must install ProjectSpec on every computer. However, the catalogs can be installed on a shared drive or a network drive.  ProjectSpec and the Catalogs can also be downloaded from our website at www.projectmatrix.com/downloads.html.

### 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.
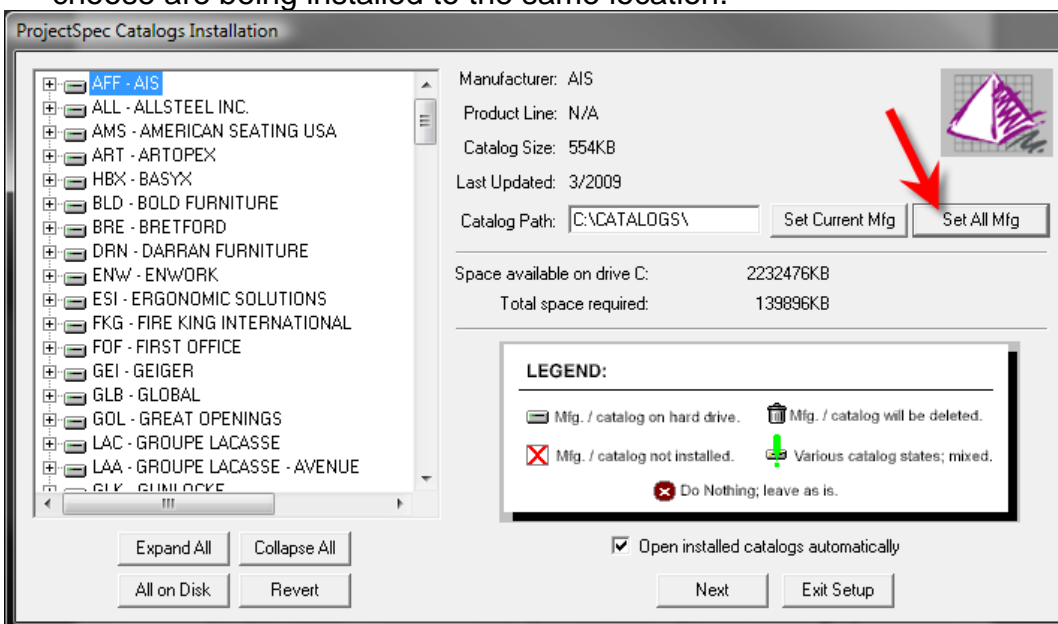
## Installing Manufacturer Pricing Catalogs to a Network Using the ProjectMatrix DVD

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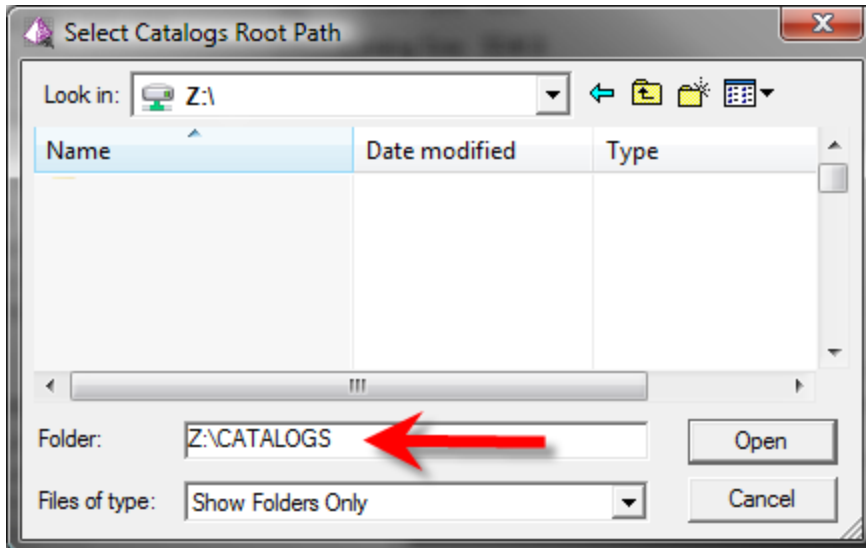2. Click the "ProjectSpec Electronic Catalogs" button.

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. **This next screen is very important.** "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.
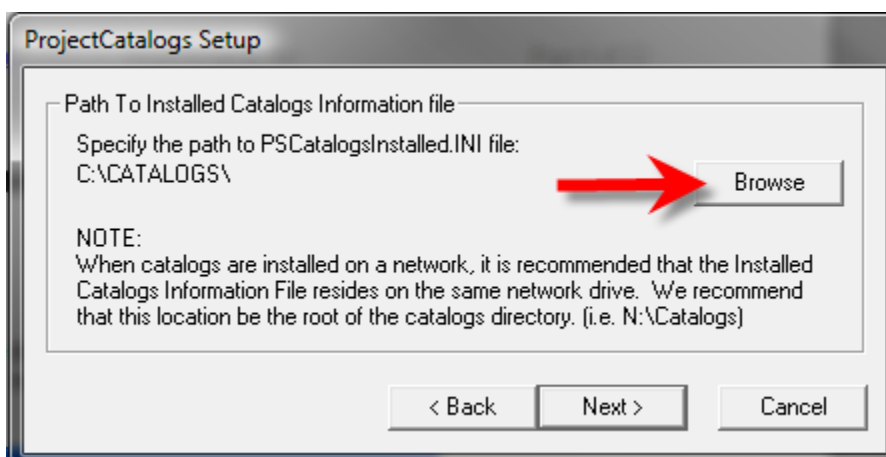
   You need to choose where on your network the catalogs will be installed. Choose the "Set All Mfg" button to make sure that all of the catalogs that you choose are being installed to the same location.
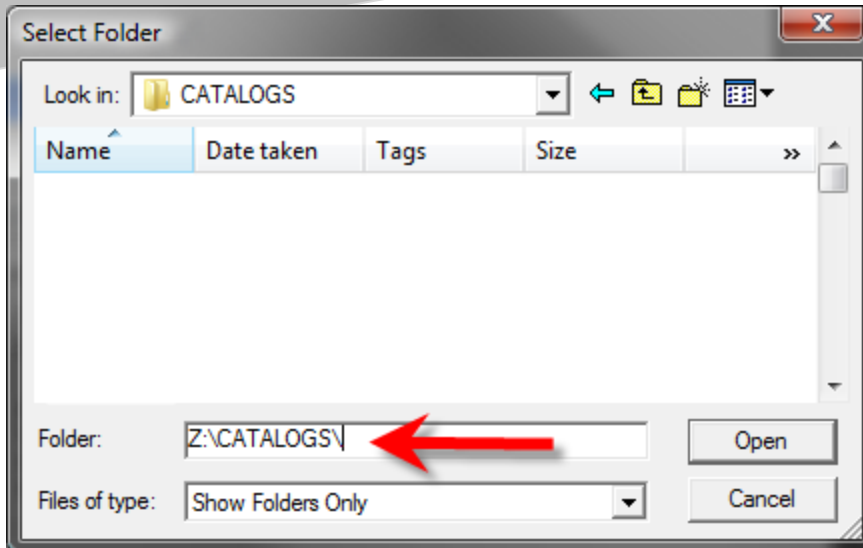
7. It is highly recommended that you make a directory called "Catalogs" in the root of your network drive and install all of your catalogs and configuration files to this directory. In the following example the catalogs will be installed to drive Z. Once you have created your path, click "Open".



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".

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.
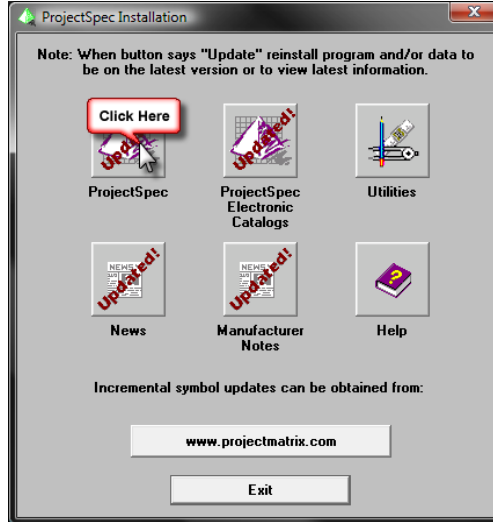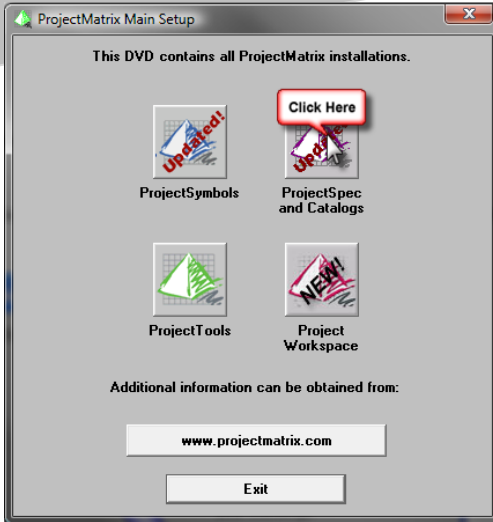
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**Note:** If your network has strict user rights permissions you may need to do some additional setup. Make sure that anyone using the catalogs from the network drive has full read/write access to the PSCatalogsInstalled.INI file. If a user does not 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.
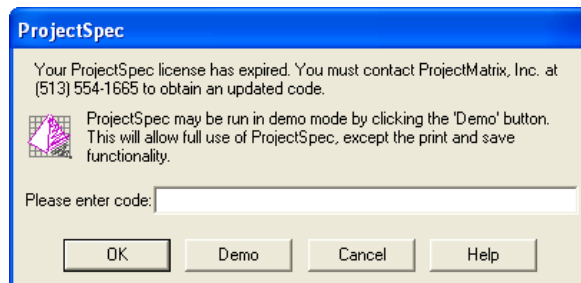
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## Installing ProjectSpec on each user's machine

**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.
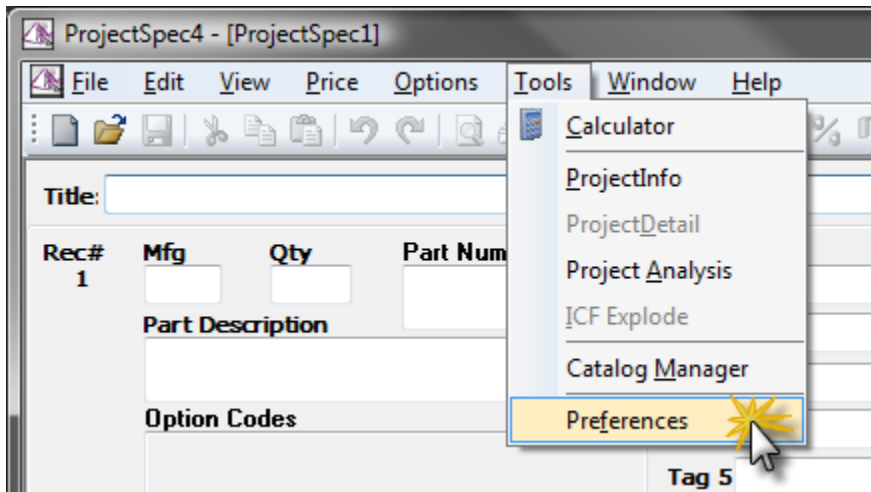2.  Click the "ProjectSpec" button.

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.
6. 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.
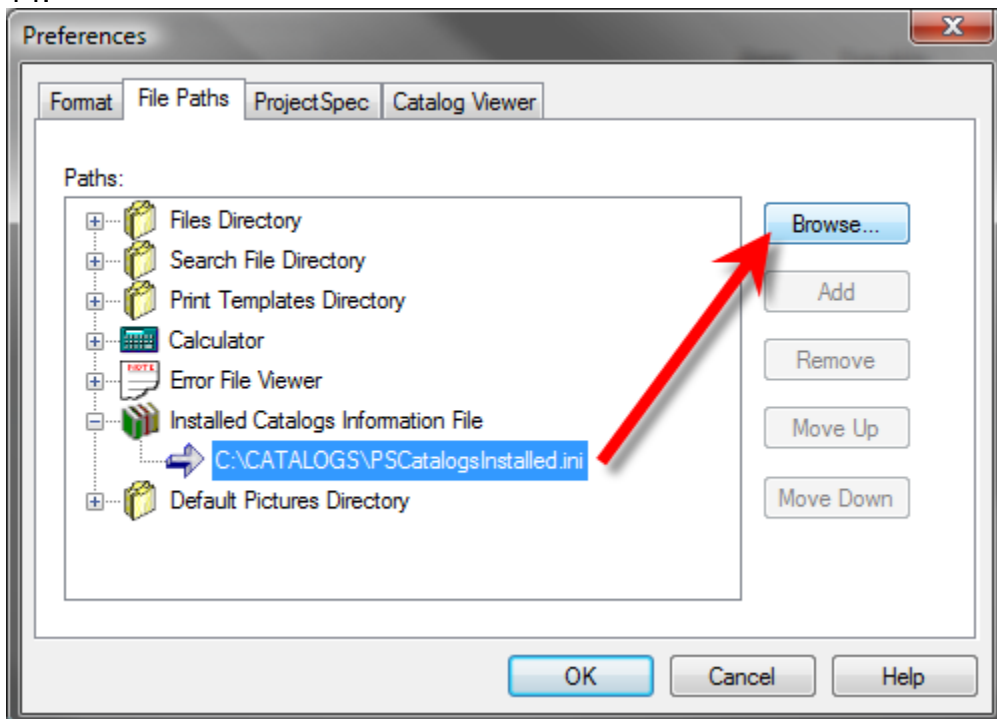
Once you have successfully entered your license code and clicked "OK", you will be prompted to register the product. Click "Register Online" once all fields are filled in.

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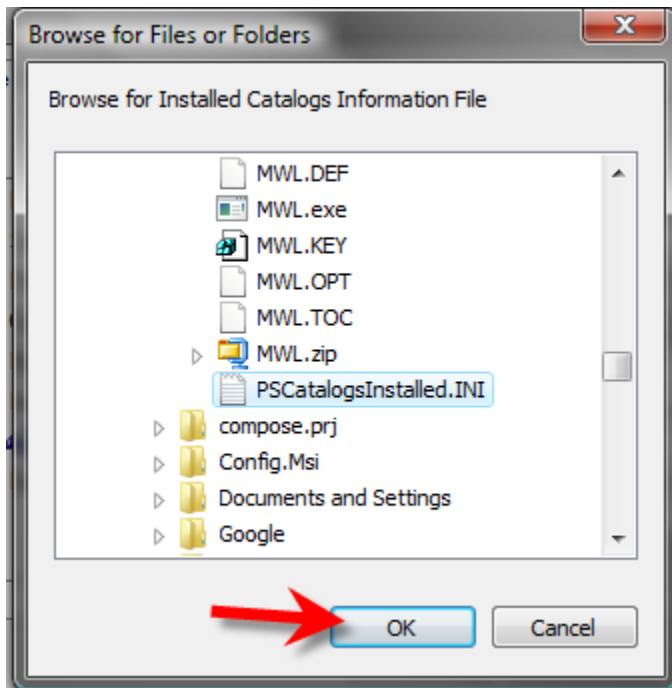


13. In the Preferences dialog window first choose the "File Paths" tab. Expand the Installed Catalogs Information File and highlight the path. Click the "Browse" button to set the new path for the PSCatalogsInstalled.INI file.
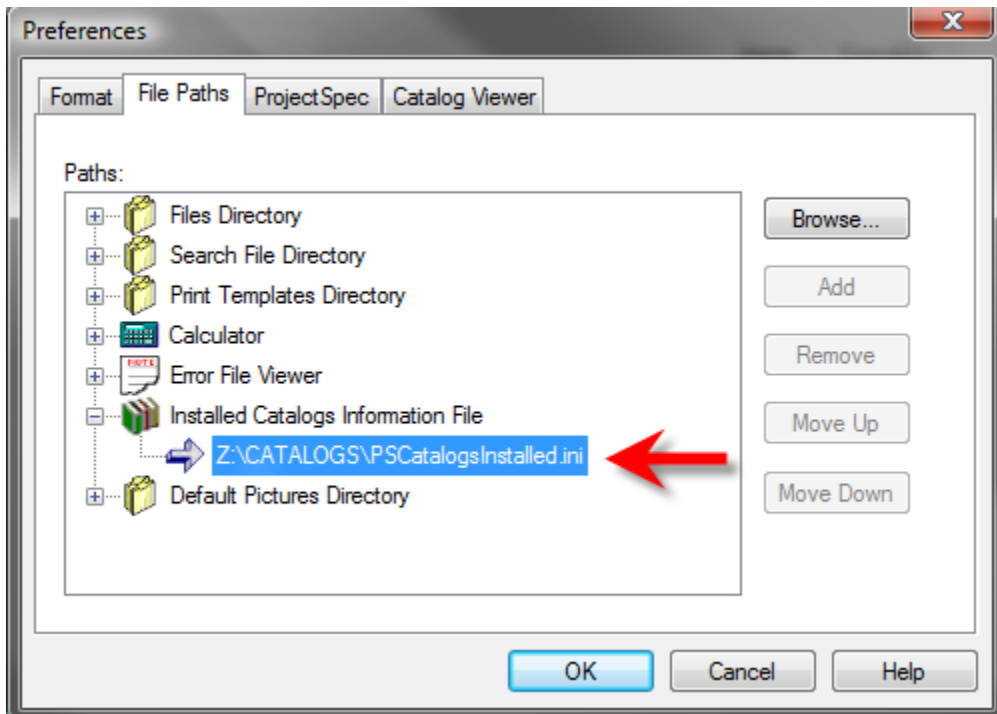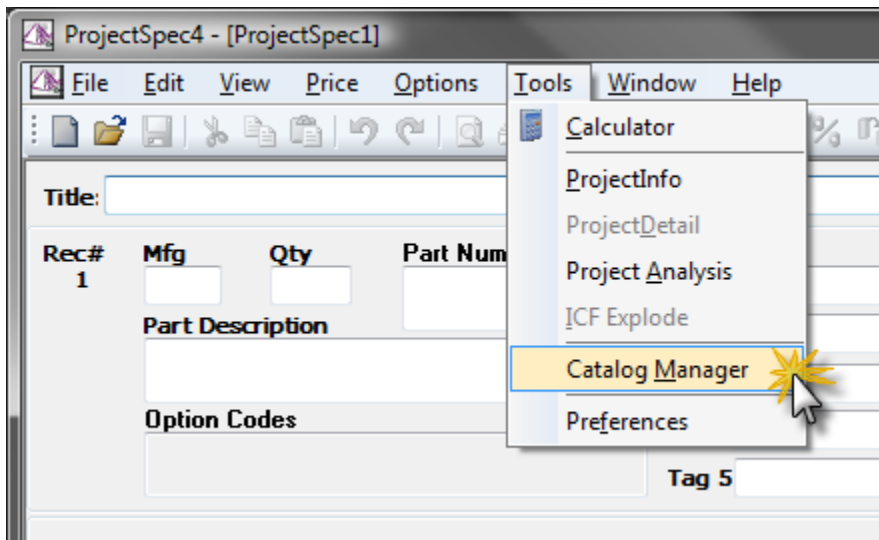
14.

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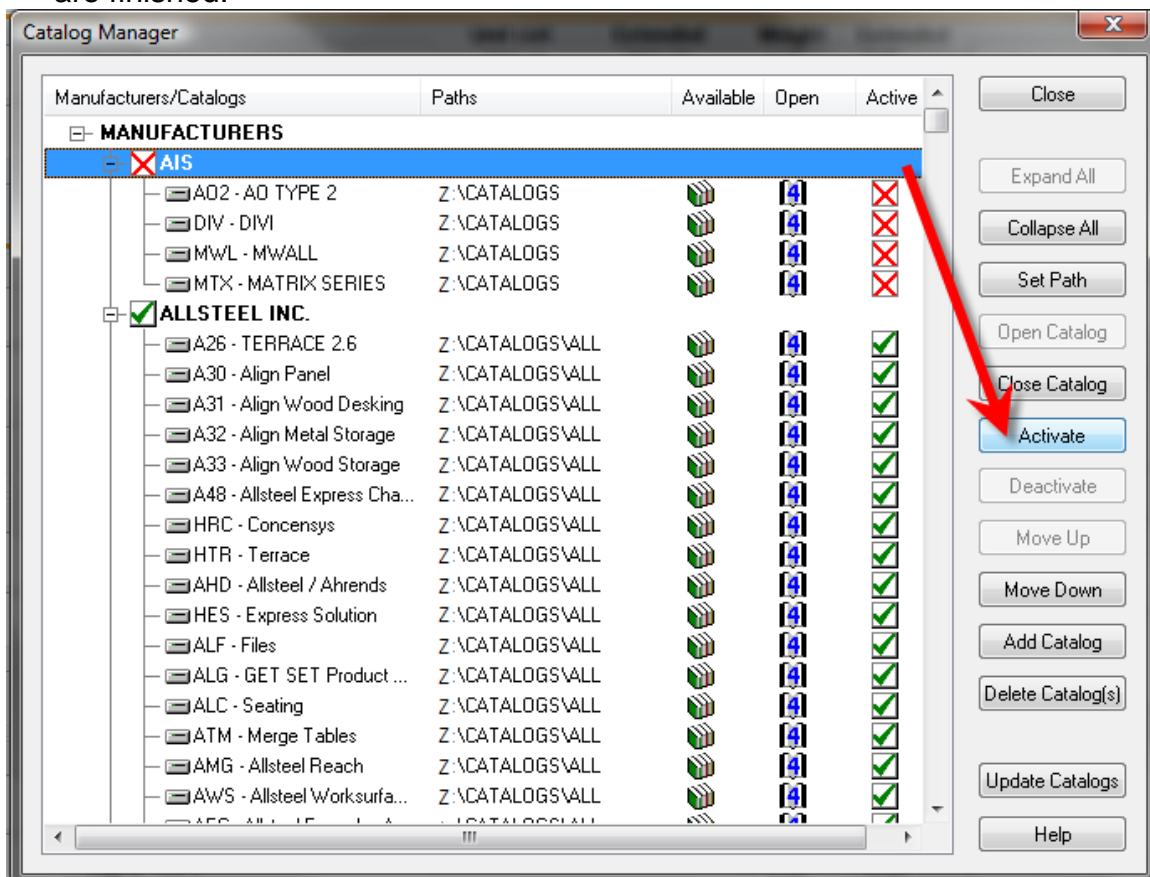


16. Confirm that the "Installed Catalogs Information File" is now set to the network drive path and click OK.

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



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.

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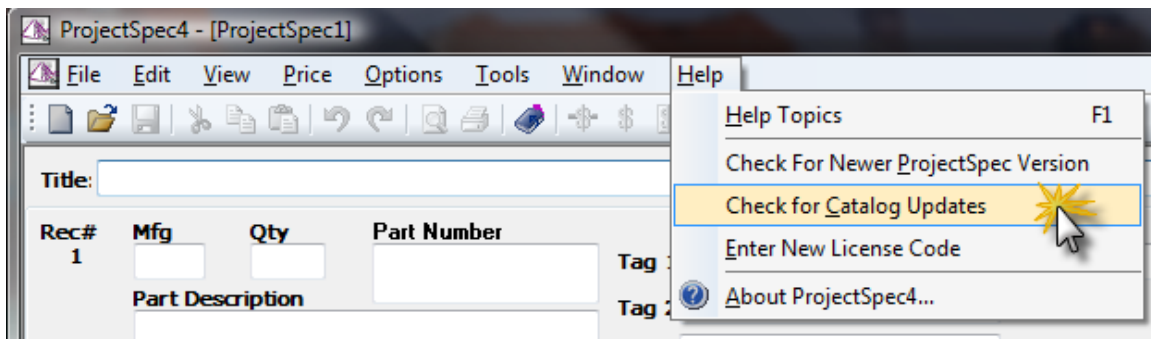
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**Note:** For ProjectSpec to run properly users must have at least <u>Power User</u> rights on their computer. If you need to set customized rights for your users please email support@projectmatrix.com to get a list of files and permissions for the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

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## 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.

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**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.

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



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.

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

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