

**GUIDELINE 4**  
**INSTALLATION**  
**MANUAL**  
**v 2.0**

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# 1. Introduction to Guideline Installation

## 1.1 Introduction to License Manager

License Manager is a software that allows several alternatives in installing Guideline, each one of them addressing different needs and having specific advantages. It supports two license types:

- Node-locked: this license is linked to the PC where Guideline and License Manager are installed. It enables one user to run Guideline, which is the local user logged into the machine (no network access);
- Floating: this allows the usage of Guideline to multiple users within a network. It is physically installed on the machine where the License Manager is installed (License Server) and allow the usage of Guideline to as many concurrent users as included in the activation code.

It is important to note that License Manager is a separate software than Guideline itself: this offers a further level of flexibility allowing the server/client installation of Guideline. That configuration can be advantageous particularly for large organizations, since the SW can be centralized in a single installation, accessed by network users, and maintained from a single instance instead of several local installations.

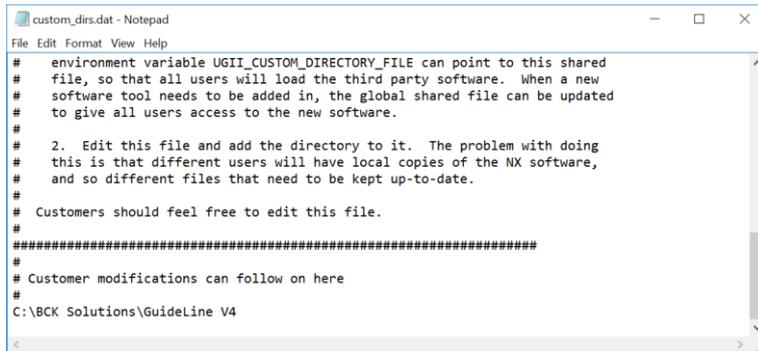
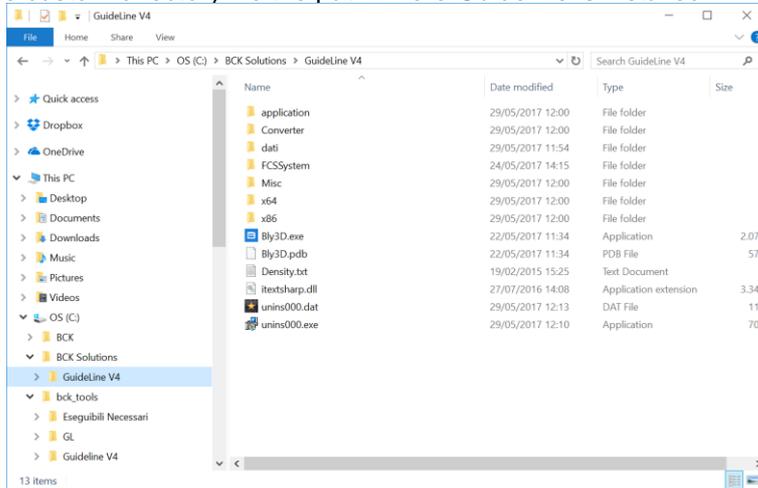
To resume, please refer to the table below:

	LOCAL GUIDELINE INSTALLATION	SERVER INSTALLATION
NODE-LOCKED LICENSE	<p>Guideline and License Manager are both locally installed into the PC that runs Guideline.</p> <p>Any user of the PC can run Guideline, one at a time</p>	<p>Guideline is installed on a server, but the license is local.</p> <p>Any user of the PC can run Guideline, one at a time, but Guideline is installed centrally on the server (i.e. sharing the components' library)</p>
FLOATING LICENSE	<p>License Manager is installed on a server and Guideline is installed locally.</p> <p>Licenses are managed by the server, therefore any network user having Guideline installed locally can run it.</p> <p>Maximum concurrent users are limited by the license code.</p> <p>Guideline is managed locally (i.e. components' library may be different)</p>	<p>Both Guideline and LM are installed on a server.</p> <p>Licenses are managed by the server; therefore, any network user can run Guideline.</p> <p>Maximum concurrent users are limited by the license code.</p> <p>Guideline is managed centrally on the server (i.e. sharing the components' library)</p>

## 1.2NX and Links

In order to use the integration between NX and Guideline an extra (manual) step is required:

- 1) Open NX->Information->NX Log File
- 2) Edit-> Find
- 3) Find the value for UGII\_CUSTOM\_DIRECTORY\_FILE
- 4) Open the custom directory file
- 5) Add to the custom directory file the path where Guideline is installed:



- 6) If the Guideline is on the server, execute caspol.bat (caspol\_x64.bat for X64 Machines)

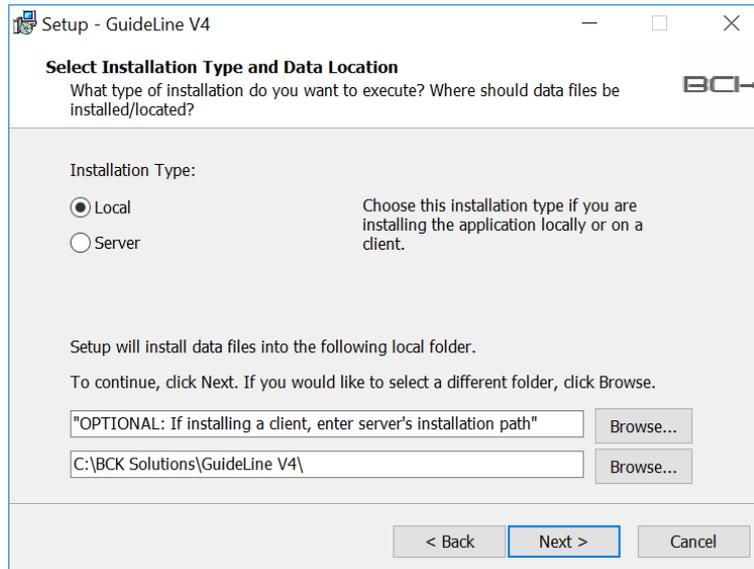
## 2. Guideline 4.0 installation: Local configuration

This configuration must be used with node-locked license, which can be accessed by the machine where it is installed only. It installs the software components and the license manager on the local machine (see [Introduction to License Manager](#) for more details).

Please, note that a local installation can use a floating license accessing a separate license server too (see [Upgrade Node Locked License to a Floating License](#)).

### 2.1 Installing Guideline Local

Launch “Guideline\_v\_4.2.0.0.exe” and, after accepting License Agreement, select “Local” from the installation type window (see below).



The window has two records:

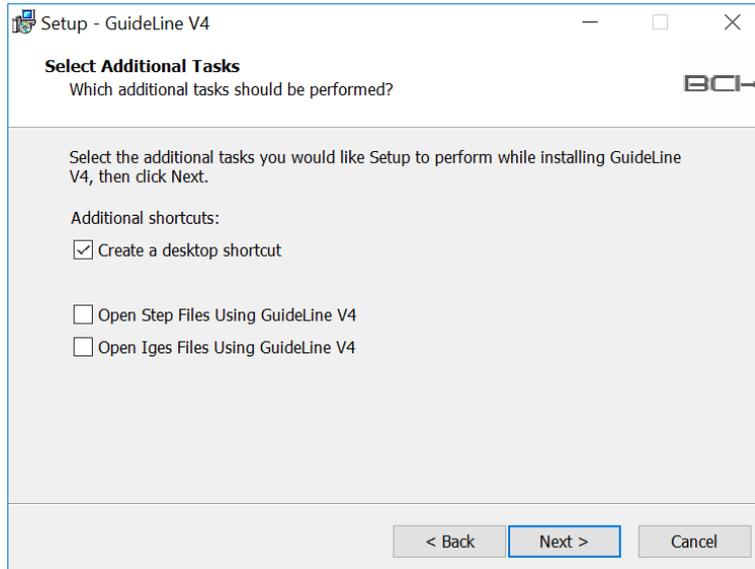
- Top record displays a message “OPTIONAL: If installing a client, enter server’s installation path”, that must be use while installing a client only (see [Installing Guideline Application Client](#)). For a node-locked installation, leave it as it is;
- The bottom record is the local installation path, where Guideline 4.0 will be installed onto the present PC. This record MUST be used for anode-locked installation.

Select folder installation by clicking “Browse” or type the full path and click “Next”.

**IMPORTANT:** although Guideline will install correctly, we recommend not to install the software in a folder under “C:\Program Files\...”, since Windows will set permissions that will prevent Guideline to import correctly custom components. Those permissions are not editable, even for an administrator.

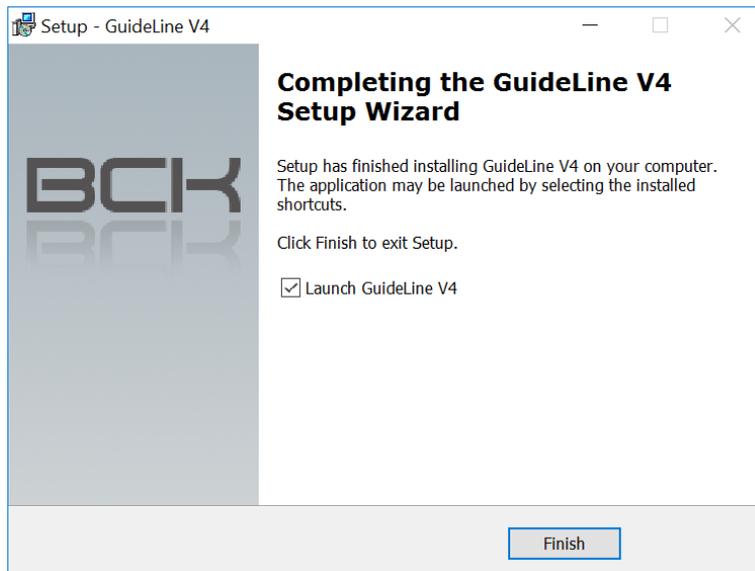
A path like “C:\BCK Solutions\Guideline V4\” will be safer.

The Additional Tasks window will then display:



“Open Step Files Using Guideline V4” and “Open Iges Files Using Guideline V4” will create file association related, so Step and Iges will be open with Guideline V4 at double click.

On the resume window, press “Install” if you confirm the installation or “Back” to modify it. From the final window, Guideline can be launched straight away.

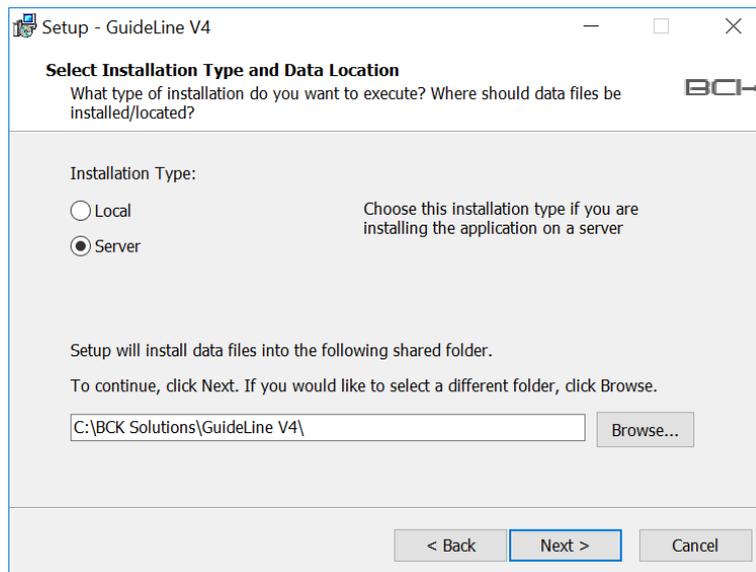


### 3. Guideline installation: Server-Client configuration

This configuration must be used with floating licenses, which can be accessed by more than a user on different machines in the network. It requires the installation of Guideline Server onto a PC that will manage the access to the license (from now on “Server”), application settings and update, and the installation of one Guideline Client (“Client”) on each of the PC that licenses must be accessed by.

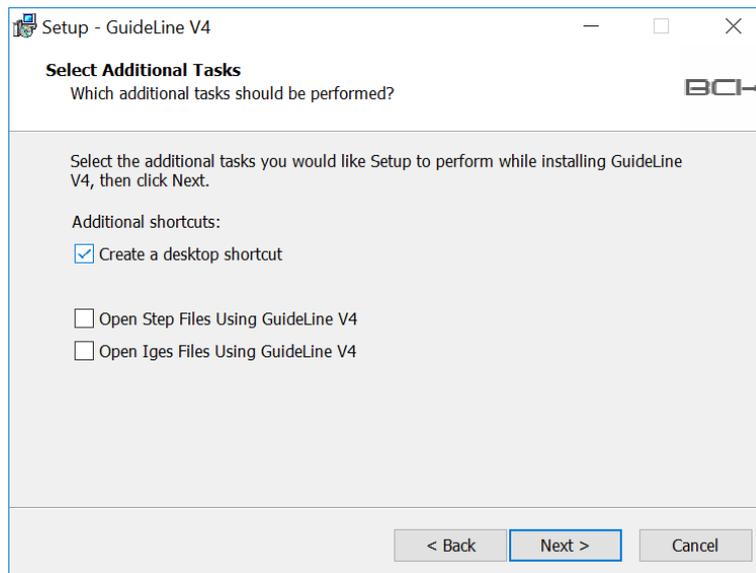
#### 3.1 Installing Guideline Server

This option installs License Manager and Guideline application that can be used locally and accessed by clients (see [Installing Guideline Application Client](#)) as well. To begin with the installation, launch “Guideline\_v\_4.2.0.0.exe” and select “License Server + Local” from the installation type window (see below).



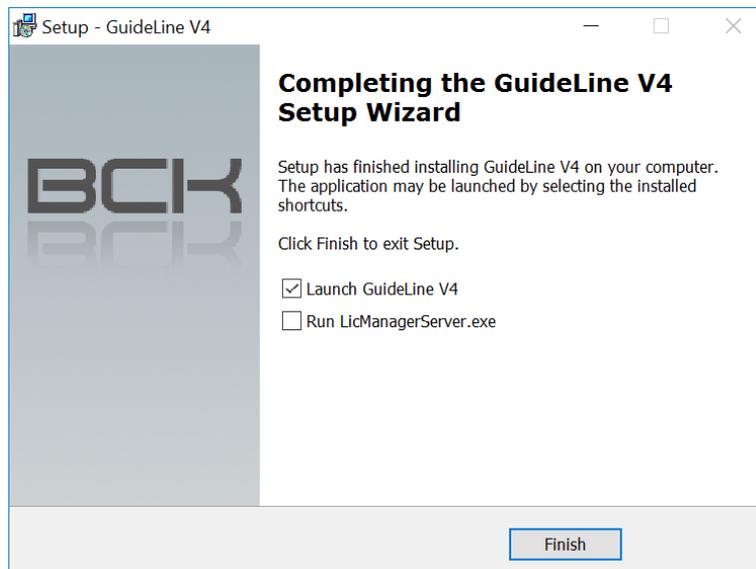
**IMPORTANT:** although Guideline will install correctly, we recommend not to install the software in a folder under “C:\Program Files\...”, since Windows will set permissions that will prevent Guideline to import correctly custom components. Those permissions are not editable, even for an administrator. A path like “C:\BCK Solutions\Guideline V4” will be safer.

The Additional Tasks window will display:



“Open Step Files Using Guideline V4” and “Open Iges Files Using Guideline V4” will create file association related, so Step and Iges will be open with Guideline V4 at double click.

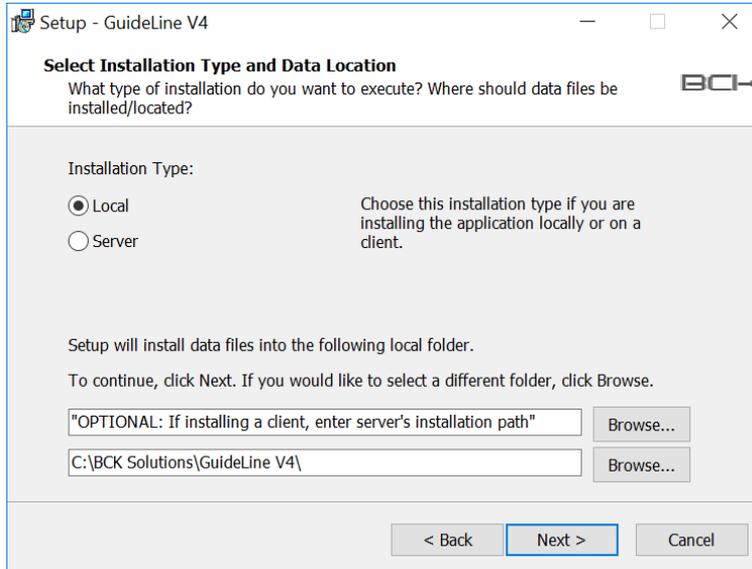
When the setup is done please DO NOT CHECK the “Run LicenseManager.exe” box: it must be run as administrator later (see [Entering the Activation Code](#)). Click Finish and exit from setup:



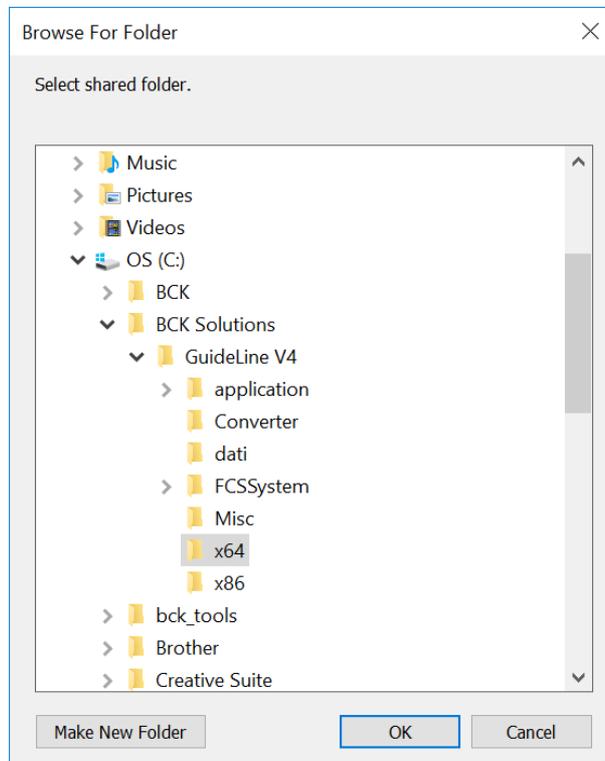
### 3.2 Installing Guideline Application Client

This option creates a Guideline’s client, which requires to specify the license and application server (see [Installing Guideline License and Application Server](#)) afterwards. It can be installed in any PC in the network able to access the shared folder on the server, where Guideline is installed.

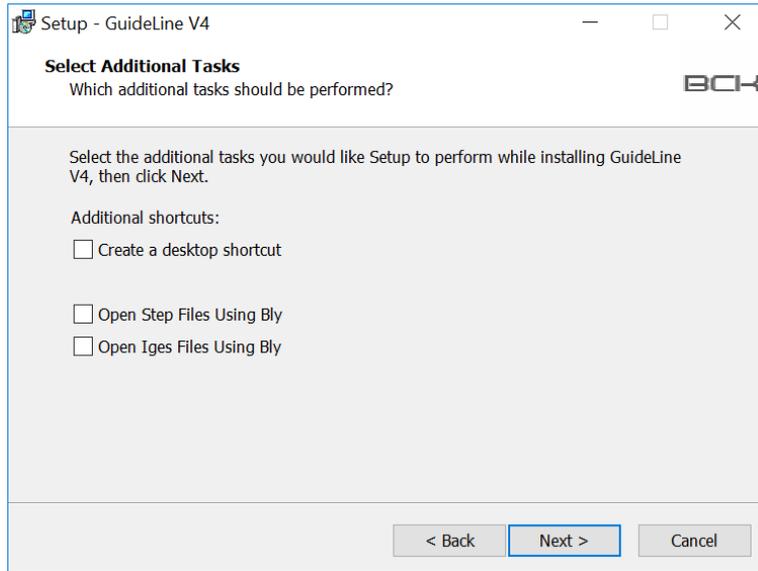
To begin with the installation, launch “Guideline\_v\_4.2.0.0.exe” and select “Local” from the installation type list (see below).



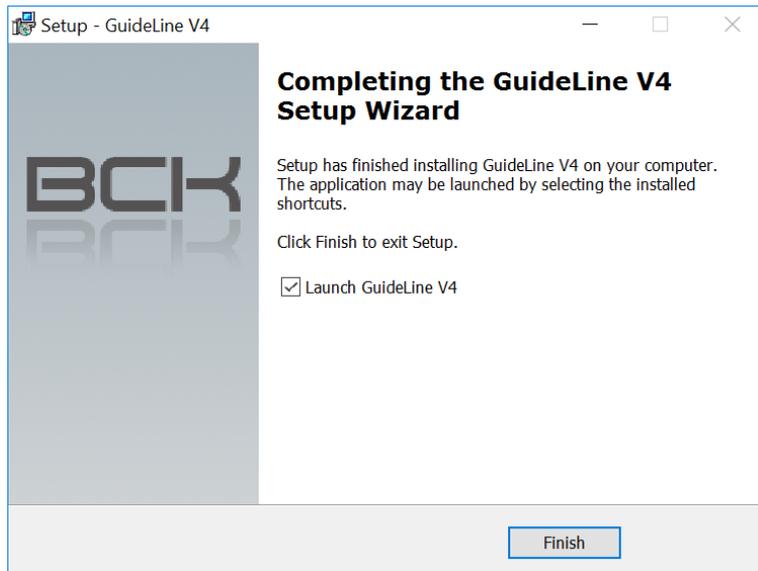
The installation requires then to browse for the shared folder (first record, empty by default) where Guideline 4.0 (application) is installed. Please note that the folder can also be local in the machine where the client is going to be installed.



The Additional Tasks window will display:



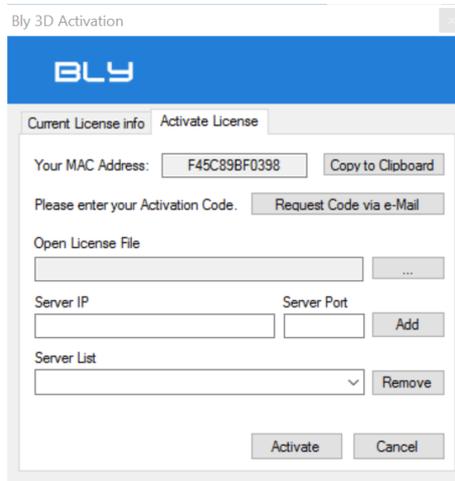
“Open Step Files Using Guideline V4” and “Open Iges Files Using Guideline V4” will create file association related, so Step and Iges will be open with Guideline V4 at double click.



## 4. License Manager configuration

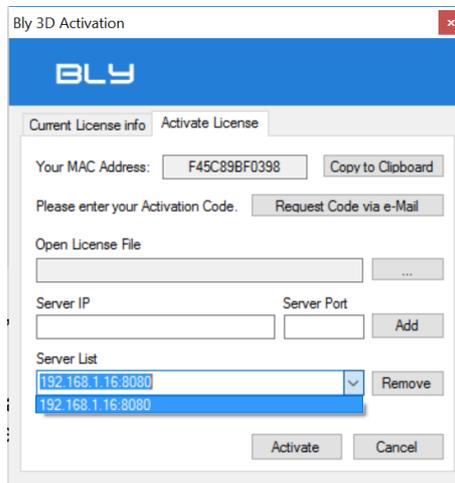
### 4.1 First Time Activation

The first time that Guideline 4.0 (either node-locked or a client of a floating license) is launched, the following window is displayed:



In case you are running a local installation and have a node-locked license, press  and navigate to the license file, then click the “Activate” button.

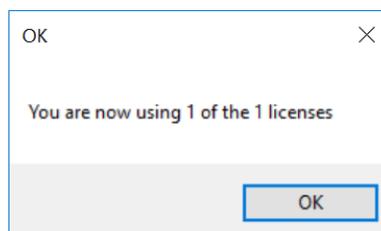
If you are launching a client of a floating license, fill in “Server IP” address and “Server Port” fields and then press “Add”. It is possible to specify several server licenses, which will be listed in the “Server List” drop-down.



Obsolete servers can be removed from the list pressing “Remove” button.

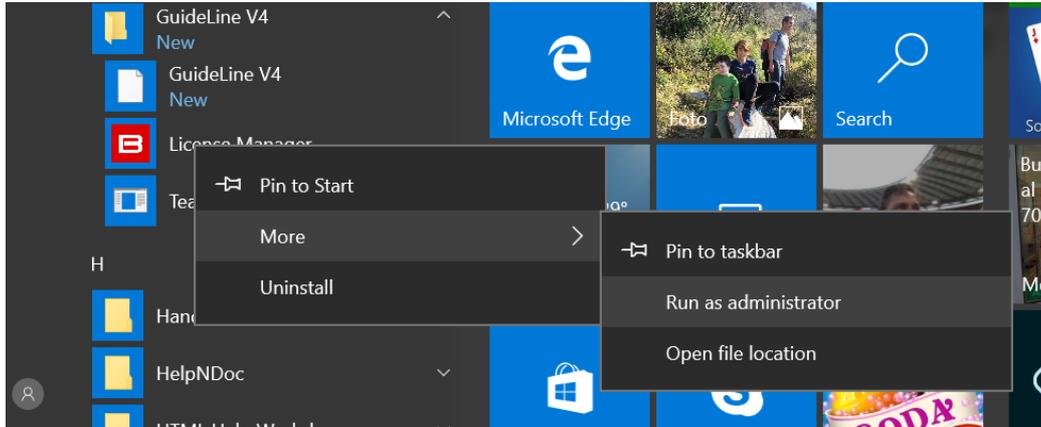
In order to make a client working, a floating license must be activated on the server: please, refer to chap. [License activation on a server](#) for the procedure.

Once the process is fully configured a message will confirm that you are using one of your available Licenses

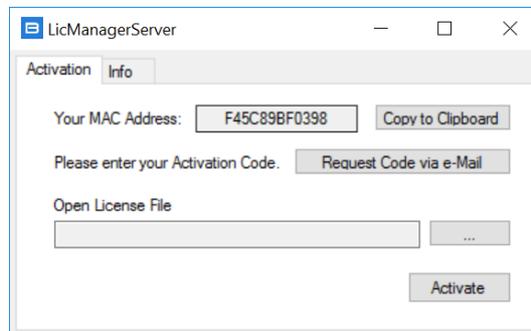


### 4.1.1 License activation on a server

From Windows Start Menu, run License Manager as administrator (right-click->More->Run as Administrator).



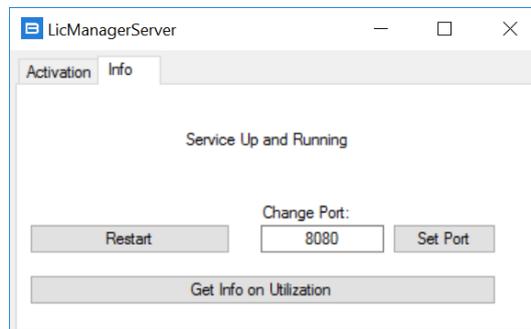
In the "Activation" Tab press  and navigate to the license file, then click the "Activate" button.



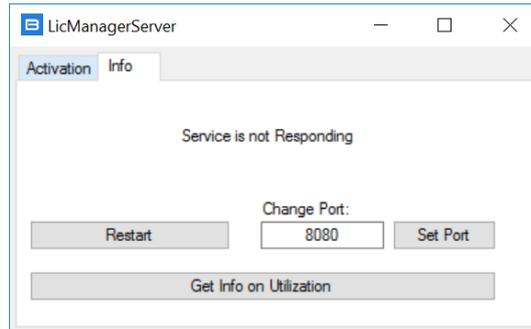
If you don't have a license file yet or is invalid, you can request it to BCK Solutions ([info@bcksolutions.com](mailto:info@bcksolutions.com)), indicating the Server's MAC Address (you can Copy it to Clipboard from this window and paste it to your email).

### 4.1.2 Checking the service status

Once the activation process is completed, click on the "info" Tab. If everything went fine during the installation process service should be up and running.



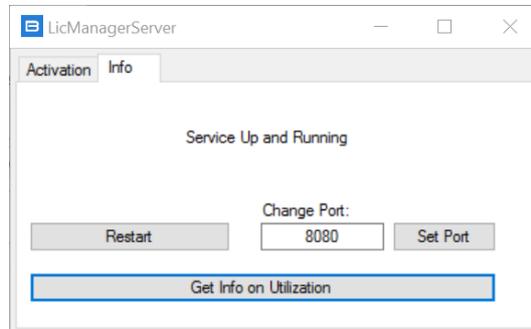
If the process is stopped or is not starting automatically, please click on the “Restart” button



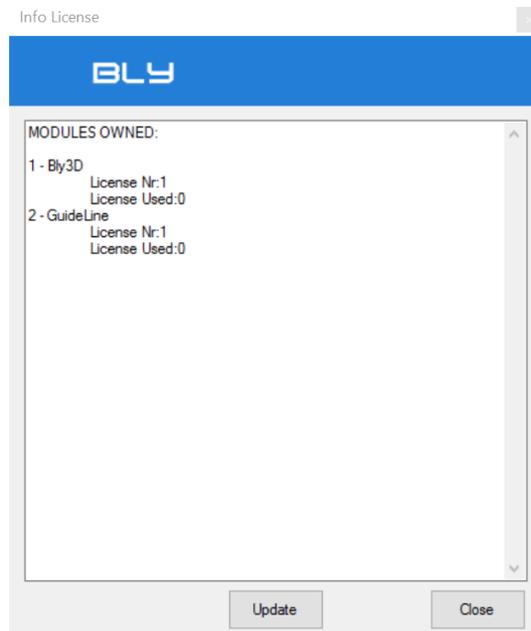
With the process stopped, the communication port can also be changed, in case of conflicts with the firewall

### 4.1.3 Current License Info

Navigating to the “Info” Tab, is also possible to access to the main information about the current License: press “Get Info on Utilization”

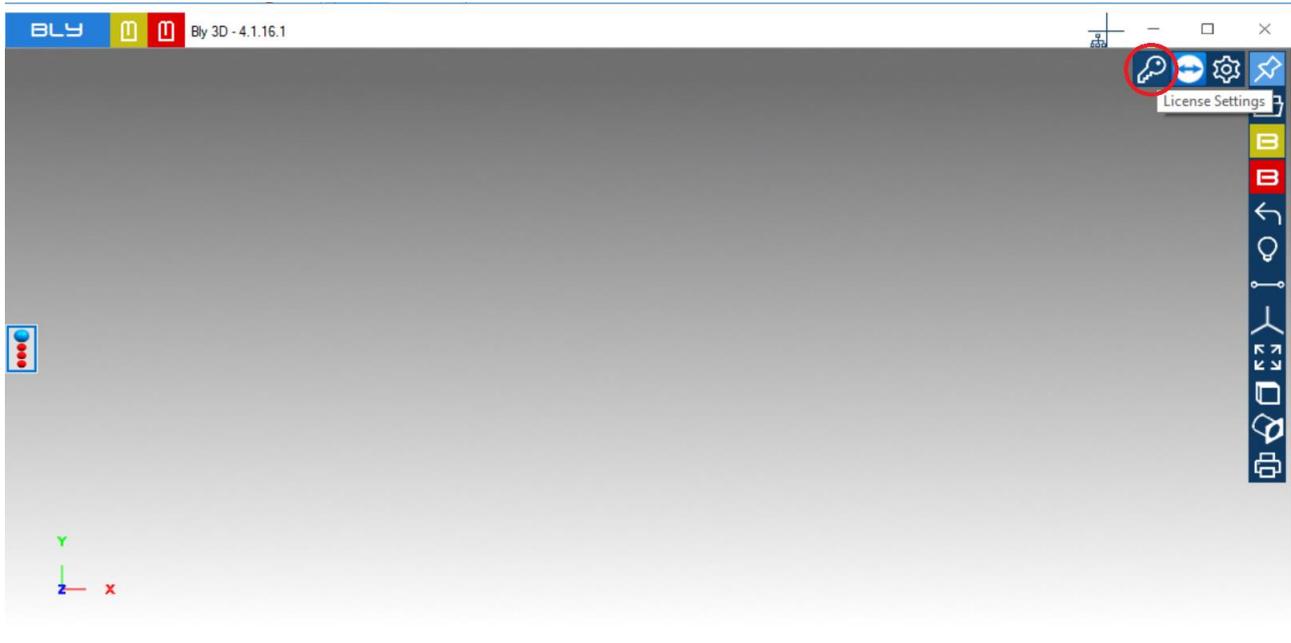


and info license window pops up listing the modules available and used in the network:



## 4.2 Upgrade Node Locked License to a Floating License

Click on the “Change License Information” button in Guideline.



The “Bly 3D Activation” window will appear.

 A screenshot of the 'Bly 3D Activation' dialog box. The dialog has a blue header with the 'BLY' logo. It contains two tabs: 'Current License info' and 'Activate License'. Under the 'Activate License' tab, there are several fields and buttons:
 

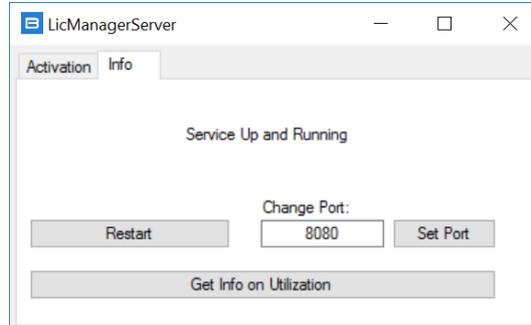
- 'Your MAC Address:' field with the value 'F45C89BF0398' and a 'Copy to Clipboard' button.
- 'Please enter your Activation Code.' field with a 'Request Code via e-Mail' button.
- 'Open License File' field with a file selection button ('...').
- 'Server IP' and 'Server Port' fields with an 'Add' button.
- 'Server List' field with a dropdown menu showing '192.168.1.16:8080' and a 'Remove' button.
- 'Activate' and 'Cancel' buttons at the bottom.

To use a floating license, fill in “Server IP” address and “Server Port” fields and then press “Add”. It is possible to specify several server licenses, which will be listed in the “Server List” drop-down.

### 4.3 Troubleshooting during Activation

If you encounter an issue during the activation process, please be sure that the IP address you have entered is the correct address of the PC on which the service is installed.

Also check if the service is currently running.



If the problem persists, please contact BCK Solutions.

### 4.4 TimeOut

If the server become unreachable for about 4 minutes the current instance of Guideline will be frozen. The associated license will be freed so it can be used by another PC but the current one will be able only to save until the Server is hooked again.

## 5. Installation via command string

Guideline 4.0 setup supports remote/batch installation via command string: this functionality is very useful for large installations or remote IT services, since eliminate the need of accessing the PC. String can also be associated to Scheduled Task for installation out of business hours.

**IMPORTANT NOTICE:** command string installation is a functionality meant for advanced IT usage. It implies an updated knowledge of Guideline's setup in the company (installed release, configuration etc.) and a previous assessment of the desired results.

Also, to support unattended tasks scheduling, it suppresses messages: as a consequence, license agreement will be considered accepted when installing/updating Guideline 4.0 via command string. Please, read the license agreement terms carefully [here](#) before using command string. A PDF or paper copy can also be requested at [info@bcksolutions.com](mailto:info@bcksolutions.com).

### 5.1 Parameters

Setup can be launched both by a DOS shell or Task Manager.

Options can be set using the following parameters into the string:

- **/type=:** sets the installation type. Possible values are:  
   "local": installs application into the specified path;  
   "server": installs both application and license server into the specified path.  
   Default is "local"
- **/localpath=:** sets the installation path. Default: "C:\BCK Solutions\Guideline V4";
- **/syncropath=:** sets the synchronisation path on client. Default: none;
- **/sc=:** creates desktop shortcut. Valid values: "true"/"false", default "false";
- **/igs=:** sets association with IGES files. Valid values: "true"/"false", default "false";
- **/stp=:** sets association with STEP files. Valid values: "true"/"false", default "false";
- **/SILENT (optional):** hide any message window during installation, including the ones where user input is required (i.e. installation directory). Option needed to run installation unattended;
- **/SUPPRESSMSGBOXES (optional):** hide any window requesting user's choices (i.e. uninstallation of a previous release). Option needed to run installation unattended

For installation type "local" and "serverlocal", /synchropath is ignored.

All syntax is case-sensitive.