

# SmartDraw 2008 Network Installation Guide



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## Installation Options

There are two ways to install SmartDraw for use in an organization:

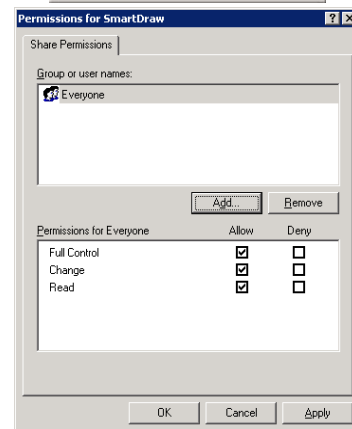
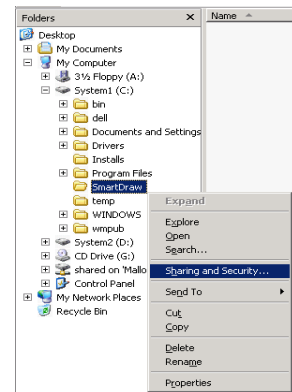
1. On a network server
2. On individual client computers

## Installing SmartDraw on a Network Server

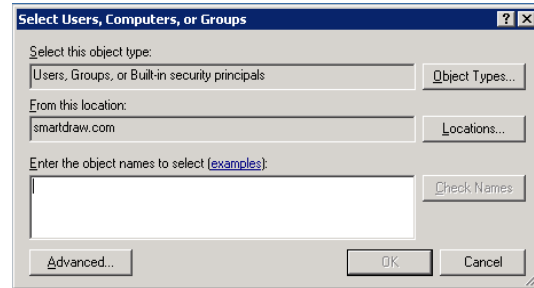
SmartDraw may be installed remotely on a server and shared by multiple users with a multi-seat license or a freedom license. The program is loaded from the server but actually runs on a user's client machine. No registry entries or other changes are made to the server. This method of installation requires the least amount of maintenance from an Administrative standpoint as only one installation of SmartDraw needs to be maintained and updated.

### Step # 1: Setting the server up properly.

1. To install on a server, you must setup an appropriate network share. On the target server, create a folder called "SmartDraw".
2. Now right-click on the SmartDraw folder and select "Share & Security".
3. Choose to share the folder and give it an appropriate share name.
4. Now click on the Permissions button to set the appropriate access to the folder.
5. In the Permissions Dialog, click on "Add" to selectively add permissions to the folder.



6. Under Normal Server configurations, you can give access to users, groups, or built-in security principles.



7. Once permissions are set, your share on the server should be ready.



#### **A Note on Permissions**

*The administrator installing SmartDraw should have "Full Control" over the folder.*

*It is recommended that you give users "Change" and "Read" permissions to the folder so they can freely access the program and make changes to libraries if necessary.*

*In the event you wish to lock down the environment, you can set the permissions to "Read" only for the folder with the exception of one file, SDX.DLX (that is created after you install SmartDraw 2008).*

*This file keeps track of the number of seats used and must be set to "Change" and "Read" permission for all users.*

*You must set the permission of SDX.DLX after it has been installed.*


## Step # 2: Installing SmartDraw 2008

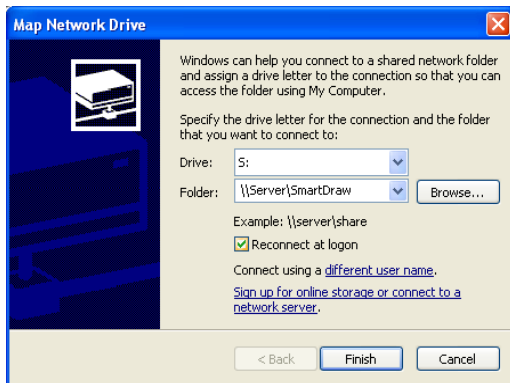
Once you've set up the share properly, run the SmartDraw "setup.msi" from the client machine or on the server.

If you install from the server, your installation directory should read:

C:\SmartDraw\SmartDraw 2008 (or the name of the shared folder you created)

If you wish to install from a client pc, you will need to map the SmartDraw share before proceeding to the next step.

1. To Map your share, open  [My Computer](#).
2. On the **Tools** menu, click **Map Network Drive**.
3. In **Drive**, type or select the [drive letter](#) to map to the [shared resource](#).
4. In **Folder**, type the [server](#) and share name of the resource, in the form of \\server name\share name. Or click **Browse** to locate the resource.
5. Click **Finish**.
6. In the **User name and password** dialog box, in **User name**, type your [user name](#) if you are prompted.
7. In **Password**, type your password.



After you've set up your mapped drive, you can then choose your newly mapped drive as the installation directory:

Your installation directory should read:

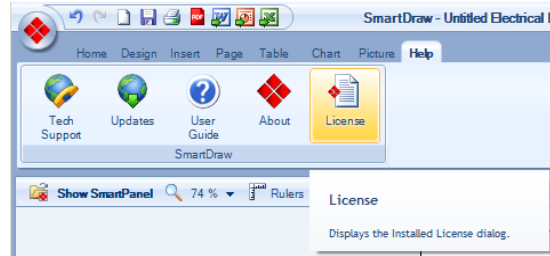
[Drive]:\SmartDraw\SmartDraw 2008

After you have your installation directory squared away, simply enter your serial number when prompted and let the installation finish. (You should also have a live Internet connection to your client machine.)

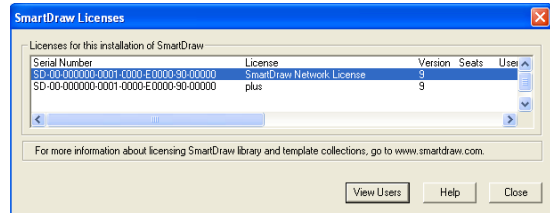
When the installation is complete, SmartDraw will create its license file *sdx.dlx* in the installation directory and then validate it by connecting to smartdraw.com.

### Administering a Multi-Seat License

(This administrative tool is not available to freedom licenses.) To access the Administration Dialog, start up SmartDraw, create a document, access the Help Ribbon and select the "License" icon.



At the "SmartDraw Licenses Dialog, hold down the "CTRL" and "SHIFT" key and click on the "View Users" button. This will open the "Network Administration" dialog with Administrative rights.

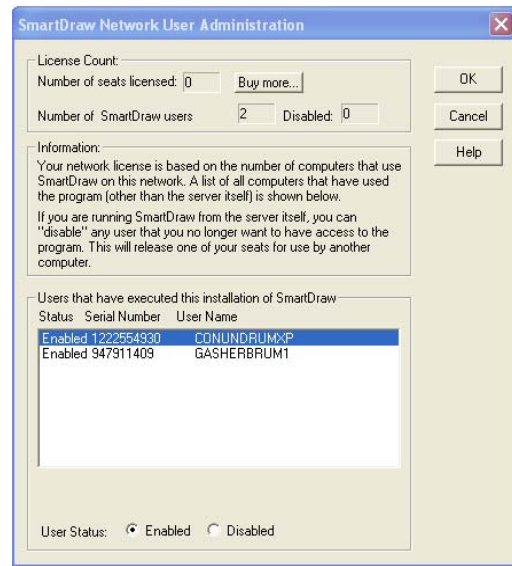


If no "View Users" button is present, this means that no one has connected to the network copy of SmartDraw yet. Exit out of SmartDraw and have one or two users log on and exit out and try accessing the dialog again.

Each new client machine that makes use of a network installation of SmartDraw with a multi-seat license is added to the list of seats used.

The "Computer Name" is logged as the "User Name" and the computer's default hard-drive's serial number is recorded as the "Serial Number".

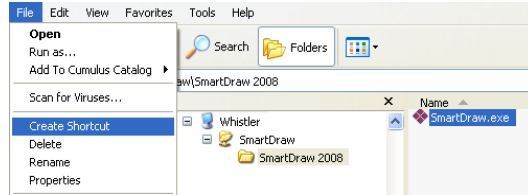
Once the number of seats purchased equals the number of seats used, no more clients may access the installation. You can disable users on the seat list to free up seats for a new user or old user. A disabled client cannot run SmartDraw from that client.



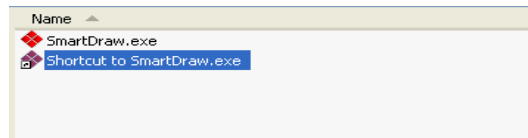
If you need more licenses, we'd be happy to explain the different options available to you. Just call 800-817-4238 or e-mail sales@smartdraw.com.

### Step # 3: Creating Desktop shortcuts for your users

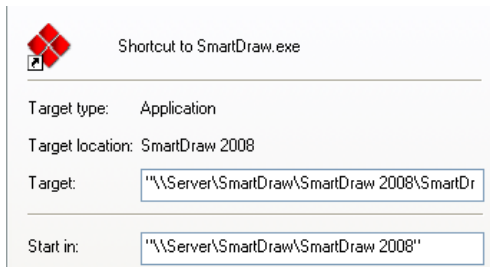
1. Now that you have SmartDraw installed on the network, you can create shortcuts to the SmartDraw.exe file so they can run the program.



2. Through Windows Explorer, browse to the SmartDraw installation directory on the server and select "SmartDraw.exe" and go to the File Menu and select "Create Shortcut".



3. Now deploy the shortcut to your users and they can click on it to run SmartDraw at any time.



## Installing on a client computer

The simplest way to install SmartDraw on an individual PC is to insert the program CD into the drive, wait for setup.exe to start, and then enter the serial number when prompted.

Alternatively, if your users have permission to install programs on their own PC, they can self-install from the setup.exe/setup.msi copied to a network server\share. The steps required are:

1. Copy setup.exe\setup.msi from the CD to a location on a shared server. (See **Step # 1: Setting the server up properly** for basic steps on how to create your shared directory.
2. Send the network (UNC) path to the setup.exe\setup.msi to your users and have them run the file.
3. When they execute the file, they will be prompted for the Serial Number to proceed with the install.

However this is not the most efficient way to install a large number of licenses onto client machines. For mass deployment of SmartDraw, you can use Orca to change or bundle certain information directly into the MSI install. After modifications, you can use distribution package to quickly install without any user action such as:

- Group Policy and the Active Directory
- Systems Management Server (SMS)
- Other remote installation software

If you are deploying SmartDraw to a Windows **Vista** Operating System with User Access Control (UAC) turned on, please see the section on Installing on Windows Vista.



## Orca, a MSI Table Editor

Orca is a Microsoft utility for modifying and validating Windows Installer packages. It is a database tool intended for setup authors and administrators that works with the Windows Installer Service. This utility is a part of the Windows Installer SDK download along with other MSI related tools.

You can use Orca to open and modify MSI packages and ISM project files.

To download and install Orca, follow these steps:

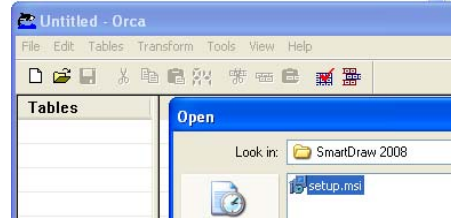
1. Visit the SDK Platform Site page on <http://www.microsoft.com> to download the Windows Installer SDK.
2. Click on that link to go to the next page to download Windows Installer SDK, which includes Orca.
3. After downloading and installing Windows Installer SDK, go to \Program Files\Microsoft SDK\Bin folder on the machine to look for Orca.msi.
4. Run Orca.msi by double clicking on it, which is the setup to install Orca on your machine.
5. After installing Orca on your machine, you will be able to right click on any MSI package and open it in Orca.

Note: Because Orca allows for direct modification of the MSI package or ISM, ISE files, which may have an impact on the project, it is recommended that users make a backup copy of the file they are about to modify.

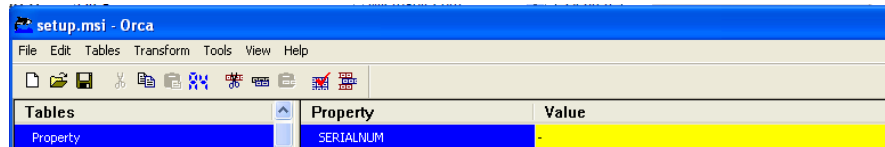
*Using Orca to bundle your Serial Number into setup.msi*

1. First copy setup.msi to the network share where you plan on hosting the install.

2. Launch Orca (which should be available under the Start → Programs Menu after it is installed) and under the File Menu, choose Open, and browse to your copy of setup.msi and select the “Open” button.



3. You will be presented with a list of values under the Tables menu.
  - a. Scroll down to “Property” and select it, which will populate the “Property & Value” window at the right of the menu and select “SERIALNUM”.



- b. Click on the Value field for “SERIALNUM” and enter your serial number in.



- c. Now go to the File Menu and click “Save”. You’ve now modified your copy of setup.msi to host your serial number. It will no longer prompt you for a serial number to install with.

4. Now deploy the setup.msi via Group Policy or SMS.
  - a. It is a good idea to run the MSI manually on a test machine to confirm the serial number was entered properly.

### *Other things you can modify with Orca*

SmartDraw has built-in internet calls to:

1. Prompt the user with a Survey after their first use of the program.
2. Warn users when a Freedom License is about to expire
3. Check for an updated version of the program (Messaging App)

#### **Survey**

SmartDraw is constantly looking for feedback on how to improve our products and appreciate any feedback we receive. To disable the survey, using Orca edit the “OwnerSurvey” property and set its “Value” to “1”.

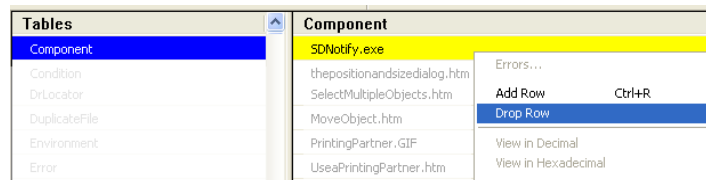
#### **Freedom Licenses**

When a freedom license is about to expire, a reminder that the freedom license needs to be renewed appears during the last 30 days every time the program is run. To disable this reminder, using Orca edit the “NoFreedomWarning” property and set its “Value” to “1”.

By turning off this reminder, SmartDraw will simply stop running after it expires if it is not renewed before then. Administrators should be aware of when the license is going to expire so it can be renewed in a timely manner before users experience any difficulties accessing the SmartDraw program.

#### **Messaging Application**

The SmartDraw Messaging Application (SDNotify.exe) is a utility that checks our servers for any messages relevant to the users, such as a new update patch or when a new version is released. To disable this application, using Orca, go to the “Components” Table and search for a Component called “SDNotify.exe”. Right click on this file, and in the Right-click Menu, choose “Drop Row”.



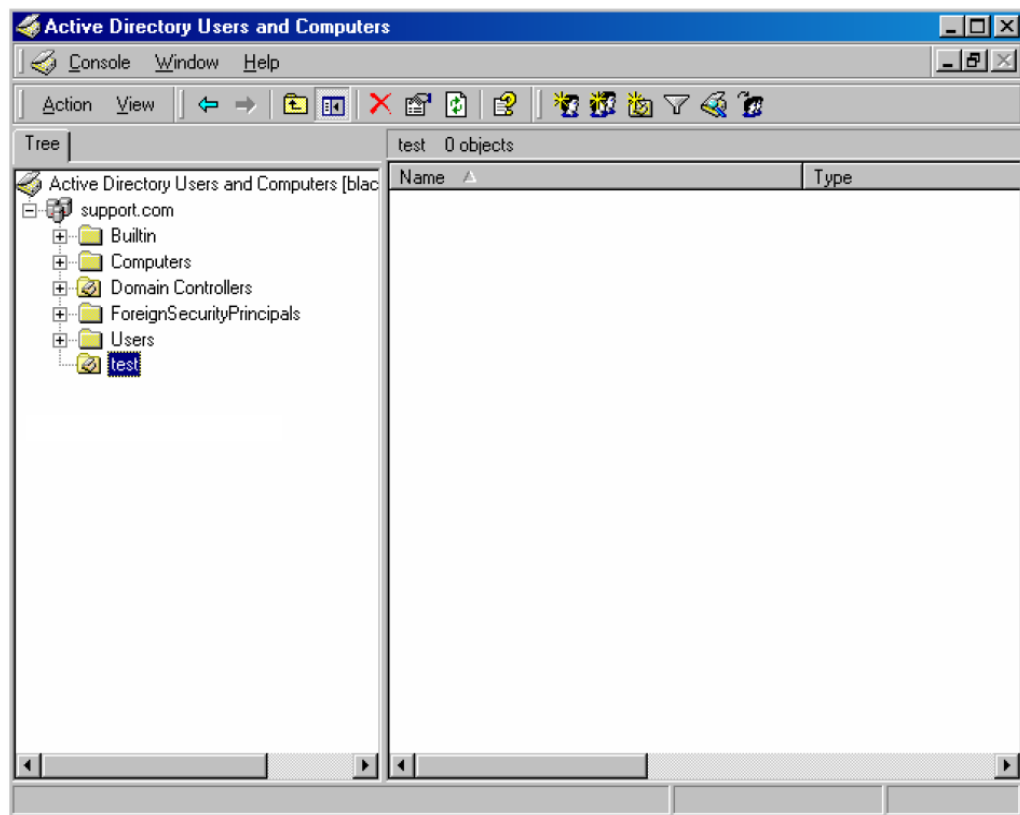
You can use Orca to change other properties of the install such as the installation directory. We suggest you take an in-depth look at the Orca documentation before doing so.

## Group Policy and the Active Directory

Group policy is a feature of Microsoft Windows NT family of operating systems that provides centralized management and configuration of computers and remote users in an Active Directory environment.

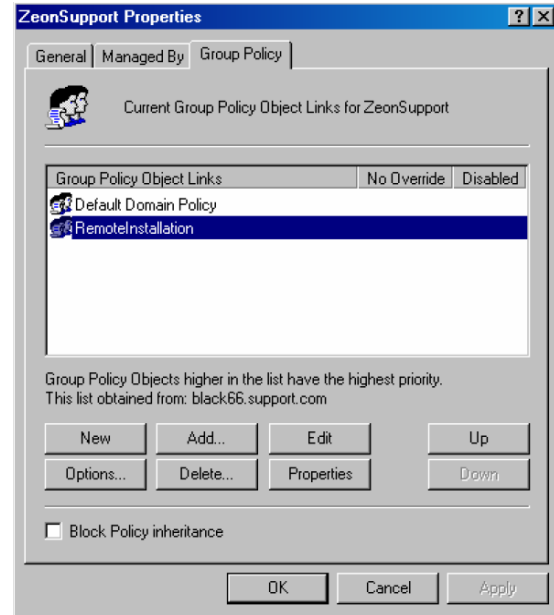
To deploy via group policy:

1. On the server, choose “Start>Programs>Administrative Tools”, and click “Active Directory Users and Computers”. This step starts Active Directory Users and Computers Microsoft Management Console (MMC).



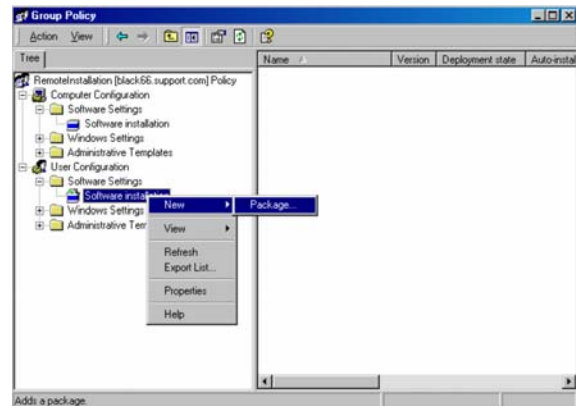
Note: If Administrative Tools was not found. Please right-click taskbar and click “Properties”, select “Display Administrative Tools” on the “Advanced” tab.

2. Right-click the Organizational Unit which you want to install the package and select "Properties".



3. In the Group Policy tab select a Group Policy Object or create a new one, and click Edit. The Group Policy MMC will start.

4. In the Group Policy MMC, expand the "Computer Configuration>Software Settings" or "User Configuration>Software Settings". Right-click Software installation and select New>Package....



5. In the Open dialog, browse to the installer (setup.msi you modified) and click open. Note: The MSI installer requires the client computers to have the MSI 2.0 engine installed.
6. In the Deploy Software dialog, select Assigned and click OK. You've now setup up SmartDraw to deploy to the computers or users found within the group policy, and it will be installed the next time the policy is updated on their computer.

## Systems Management Server (SMS)

Microsoft Systems Management Server (SMS) is a systems management software product by Microsoft for managing large groups of Windows-based computer systems. SMS provides remote control, patch management, software distribution, and hardware and software inventory.

To distribute via SMS:

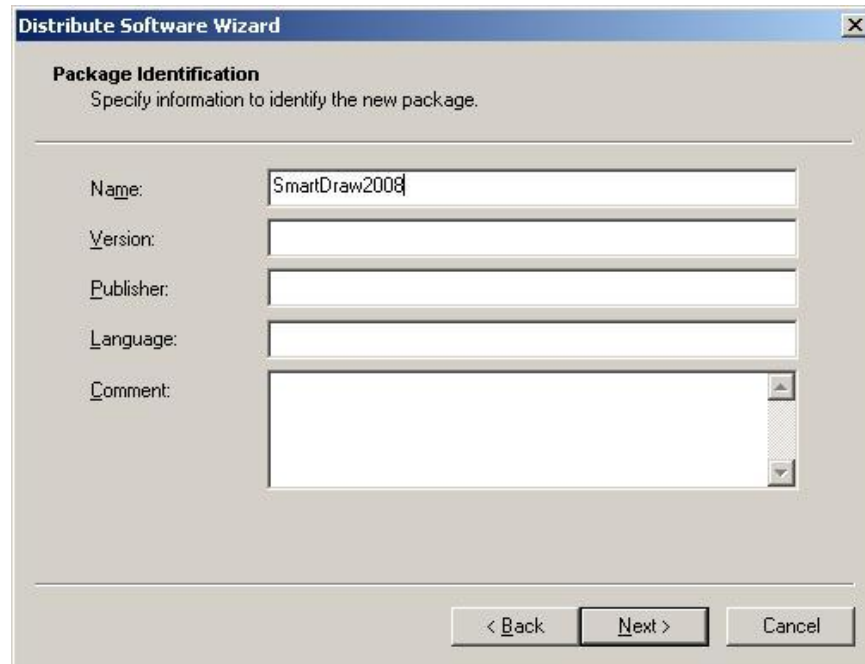
1. Copy the modified setup.msi either to a network share or a local share on the SMS site server. Name the share SmartDraw2008 and set the share permissions to Everyone - Full Control. Set NTFS security to the default of Read & Execute, List Folder Contents and Read for the group you wish to grant permission to the installation folder.
2. Create a collection of computers which contains all the computers onto which SmartDraw2008 will be installed.
3. From the SMS Administrator Console, right click Packages and select All Tasks, Distribute Software - this will initiate the Distribute Software Wizard, click Next.



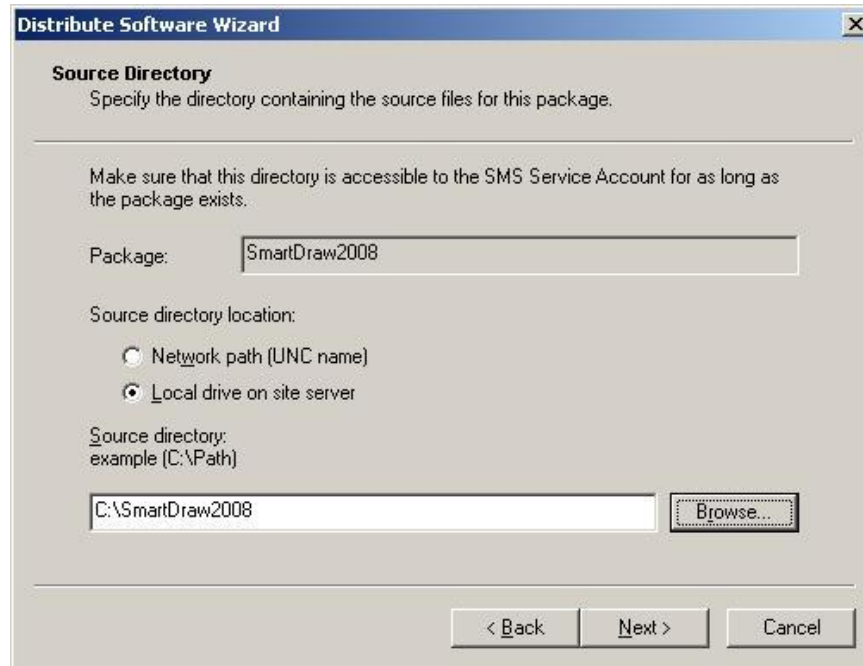
4. On the Package page, select "Create a new package and program", click Next.



5. On the Package Identification page, enter SmartDraw2008 in the name field, click Next.



- On the Source Directory page, select “Network path (UNC name) if you placed the installation files on a network share, otherwise, select “Local drive on site server” and click Browse and navigate to the appropriate share, click Next.

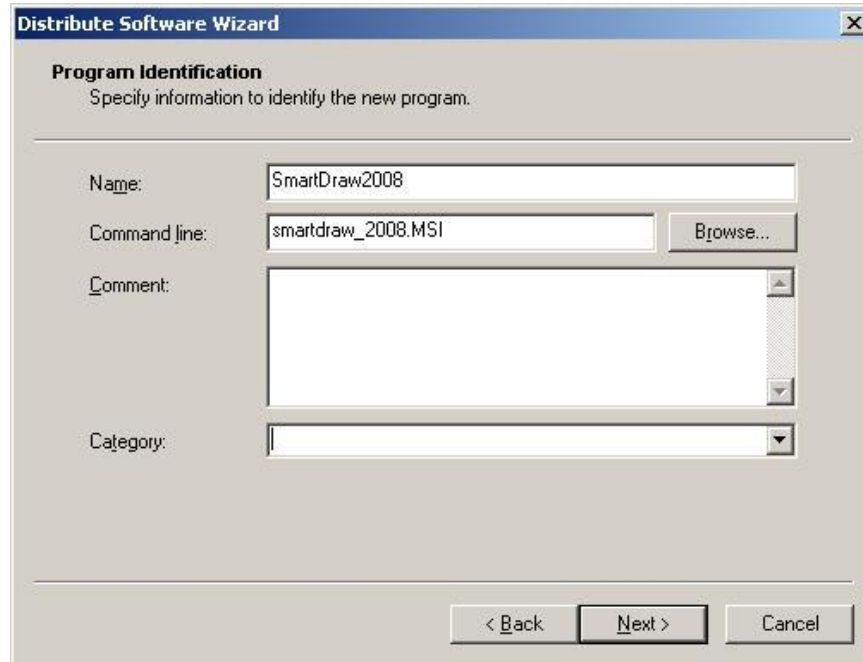


- On the Distribution Points page, check the distribution point(s), click Next.

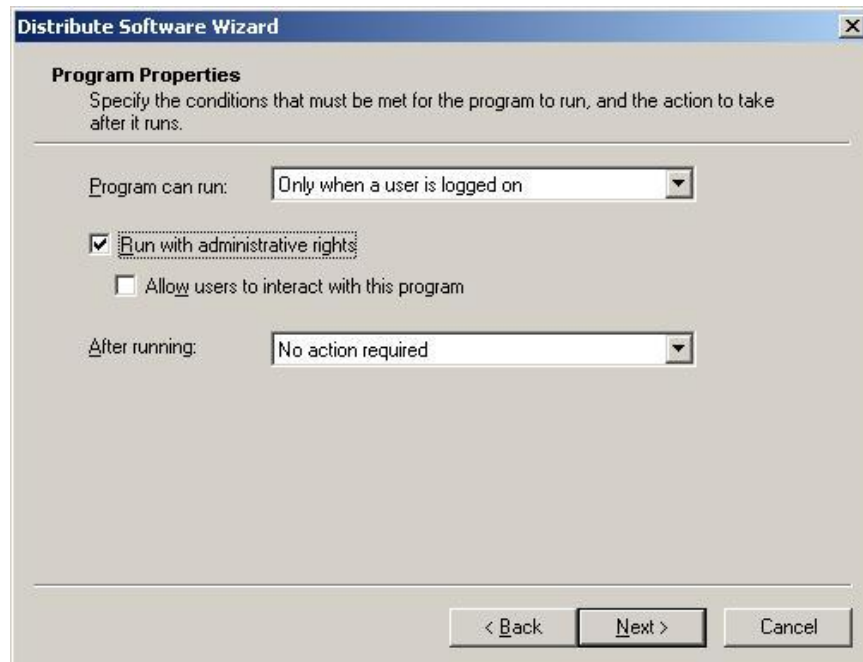




9. On the Program Identification page, enter SmartDraw2008 in the Name field and click on Browse to navigate to the Setup.MSI file in the appropriate installation share, click Next.



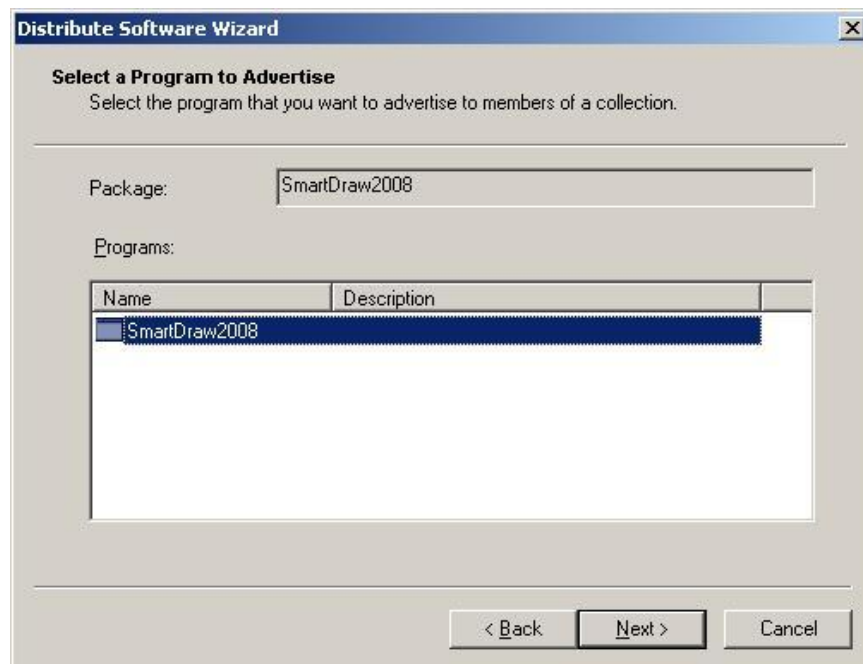
10. On the Program Properties page, select the appropriate "Program can run" option and check the "Run with administrative rights" option, click Next.



11. On the Advertise a Program page, make sure SmartDraw2008 is displayed in the Package field and select Yes to “Do you want to advertise a program from this package” option, click Next.



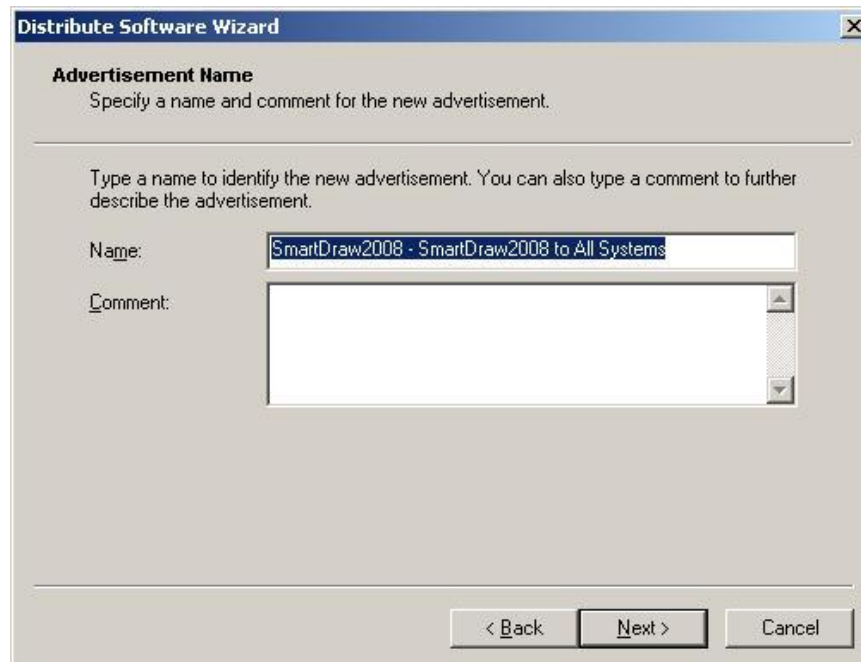
12. On the Select a Program to Advertise, make sure SmartDraw2008 is selected and click Next.



13. On the Advertisement Target page, click “Advertise this program to an existing collection” option and click Browse. Navigate to the collection you created to install SmartDraw2008, click Next.



14. On the Advertisement Name page, ensure the SmartDraw2008 – SmartDraw2008 to “name of collection” shows up and click Next.



15. On the Advertisement Schedule page, select the appropriate option for your environment, click Next.

**Distribute Software Wizard**

**Advertisement Schedule**  
Specify when the program will be advertised.

Advertise the program after: 9/13/2007 4:36 PM

This advertisement can be set to expire and therefore no longer be available after a specified date and time, even if the program has not yet run on the client. Do you want this advertisement to expire?

No. This advertisement never expires.  
 Yes. This advertisement should expire.

Expiration date and time: 3/13/2008 4:36 PM

< Back Next > Cancel

16. On the Assign Program page, select “Yes, Assign the program”, click Next.

**Distribute Software Wizard**

**Assign Program**  
Specify whether to assign the program.

Assigning a program causes it to become mandatory. An assigned program will automatically run if it has not already been run on the client. Do you want this program to be assigned after a specified date and time?

No. Do not assign the program.  
 Yes. Assign the program.

Available after: 4:36:09 PM 9/13/2007

Assign after: 9/13/2007 4:36 PM

Expires after:

< Back Next > Cancel

17. Click Finish on the Distribute Software Wizard and SmartDraw is now set to distribute to your computer environment.



## Installing on Windows Vista

With the release of Windows Vista, a new feature called User Access Control was introduced. The main goal of User Account Control is to reduce the exposure and attack surface of the operating system by requiring that all users run in standard user mode and software is installed on a per user basis by default. For programs such as SmartDraw, which takes an average of 2 gigabytes of disk space, per user installation by machine is not recommended.

As a defense-in-depth measure, User Account Control also provides additional protection for administrators through its Administrator Approval Mode. With Administrator Approval Mode, Windows Vista will run most applications with standard user permissions even if the user is an administrator. If a user wishes to run a program that requires administrator permissions, they must give consent through a User Account Control prompt. This helps limit malware's ability to make system-wide changes without the administrator's knowledge. However, Administrator Approval Mode does not provide the same level of security or control as a true standard user account.

The UAC control creates some difficulties when installing SmartDraw, as the Windows Installer 4.0 engine, running in the Local System account on Windows Vista, has lesser permissions than it had on previous Windows versions and inheritance of permissions does not work properly with MSI installations.

### Installing a individual client PC

To work around this, you must install with setup.exe, instead of setup.msi. Windows Vista will immediately detect that setup.exe is an install program that will require elevated rights and therefore display the UAC prompt in which you can give it permission to continue running. As a result, the entire install executes with elevated privileges. In contrast when running the setup.msi directly, the UAC prompts occurs later and does not elevate rights in the correct sequence of events, and most installations run with restricted permissions.

### Deploying via Group Policy & SMS

Deploying via Group Policy, SMS or other deployment systems should largely remain unaffected, as the Systems Administrator should not be affected by UAC when deploying to a Vista client. Please contact [support@smartdraw.com](mailto:support@smartdraw.com) with your network environment details if you encounter problems.

As documentation on how to work with these new restrictions is released, SmartDraw will continue to monitor and improve this aspect of installation.

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An "Upgrade" is a new version of the Product, and is identified by the numeral to the left of the decimal point following the name of the Product. A "Maintenance Release" is a software update to an existing version of the Product that is identified by the numeral to the right of the decimal point following the name of the Product. For example, in "Product 2.1", "1" is the Maintenance Release number and "2" is the Upgrade number. SmartDraw.com has the right, its sole discretion, to determine whether a particular change or addition to the Product is an Upgrade or a Maintenance Release.

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1. Single User License. If you purchased a single-user license, you may install and use one copy of the Product on a single computer (the "Primary Computer"). Subject to the terms and conditions of this License, you may make one (1) other copy of the Product and install it on another computer, provided the second computer is used exclusively by you. The two installations may not be used at the same time, and the second installation may not still be used after the time you no longer own the Primary Computer on

which the Product is installed. Your right to use the Product is perpetual (provided that this License is not terminated as specified elsewhere herein). You have the right to receive, free of charge, all Maintenance Releases for the version of the Product that you originally purchased. You do not have the right to receive free Upgrades, but you may be entitled to a discount on our standard fee for Upgrades, if so provided in your Sales Agreement.

2. **Workgroup Multi-Seat License.** If you purchased a workgroup multi-seat license, you may install the Product on more than one computer, or install the Product on a network server so that multiple computers can access it, in either case up to the limit set forth in the Sales Agreement. The Product may be installed on a network server, provided that the number of computers that access the Product via that server or otherwise does not exceed the number of computers specified in your Sales Agreement. For example, if your Sales Agreement specifies a workgroup multi-seat license for 100 computers, the Product may be installed: (a) on a network server where it will be accessible by no more than 100 different computers connected to the network served by that server, or (b) on up to 100 individual PC's, or (c) on some combination of both (a) and (b), provided that the total number of PC's that access the Product does not exceed 100. Your right to use the Product is perpetual (provided that this License is not terminated as specified elsewhere herein). You have the right to receive, free of charge, all Maintenance Releases for the version of the Product that you originally purchased. You do not have the right to receive free Upgrades, but you may be entitled to a discount on our standard fee for Upgrades, if so provided in your Sales Agreement.

3. **Workgroup Concurrent-User License.** If you purchased a workgroup concurrent-user license, you may install the Product on a network server, where the number of PC's that access the Product simultaneously does not exceed the number of users specified in your Sales Agreement. Your right to use the Product is perpetual (provided that this License is not terminated as specified elsewhere herein). You have the right to receive, free of charge, all Maintenance Releases for the version of the Product that you originally purchased. You do not have the right to receive free Upgrades, but you may be entitled to a discount on our standard fee for Upgrades, if so provided in your Sales Agreement.

4. **Freedom Site License.**

a. **Full "Freedom" license.** If you purchased a "Freedom" site license, you may install any number of copies of the Product, but only on computers owned by your company/organization, for use strictly by your employees and agents. While you may install the Product on any number of computers without violating the license, you acknowledge that additional fees will be assessed, pursuant to the Sales Agreement, if you install the Product on more computers than the quantity listed in the Sales Agreement. Such fees shall be determined at the end of each 12-month period, and shall be assessed for the subsequent 12-month period. Your employees and agents may install a copy of the Product on their personally owned home computers, provided that they use the Product for your internal business purposes only, and not for their own personal use. You are responsible for the compliance of your employees and agents with the terms of this License. Your right to install and use the Product is valid only during the limited term specified in your Sales Agreement. The term will automatically renew for consecutive 12-month periods unless you provide written notice to cancel the license at least 30 days prior to the expiration of the term. You acknowledge that the Product is designed to cease to function on the expiration date if the license term is cancelled. You have the right to receive, free of charge, all Maintenance Releases and Upgrades that we make generally available during your license term.



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