Installation Guide

This guide describes the steps required to install BizBroadcast on a client workstation. If BizBroadcast is being installed in a Terminal Services/Citrix environment, refer to document titled "BizBroadcast Terminal Services Installation Guide".



Installing in a Terminal Services/Citrix environment requires a different license. If you do not see the Terminal Services product available for download in your customer portal (<u>http://biznet.flexnetoperations.com/</u>), contact your BizNet Sales representative for information on that product.

Installation Overview

BizBroadcast is designed to be run on a client workstation and is run interactively as opposed to unattended. While running a distribution, Excel should be left as the foreground application. A BizBroadcast license is one per user per workstation. The license must be activated by the BizBroadcast user while logged in on their workstation. The product can be installed on a remote server or workstation that can then be accessed via Remote Desktop or other remote accessing software to allow offloading of the processing.

If you decide to install BizBroadcast on a server for remote access, the license is per user and should be activated while logged in as **the** specific user who will be using BizBroadcast.

🚺 IMPORTANT

The Scheduler feature of BizBroadcast is designed for interactive desktop use only and is not recommended for use in a Terminal Services/Citrix environment where session timeouts can occur.

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System Requirements

Please refer to the BizBroadcast System Requirements document to ensure that your systems meet the basic system requirements before proceeding.

Step 1: Install BizBroadcast

- Download the BizBroadcast installation .zip from the BizNet Software portal (<u>http://biznet.flexnetoperations.com</u>).
- 2. Extract the contents of the .zip to any directory then browse to that directory.
- 3. Log in as the user who will be (or currently uses BizBroadcast). If the user does not have rights to install applications, log in as an administrative user. If BizBroadcast is already installed, be sure to log in as the same user who performed the old installation to ensure the old program is shown in Programs and Features/Add Remove Programs.



IMPORTANT

Uninstall any existing versions of BizBroadcast from Programs and Features (or Add/Remove Programs on Windows XP). Make a note of the version installed to determine whether user config files need to be deleted. See <u>Delete existing User.config files</u>.

- 4. Browse to the directory to which the BizBroadcast installation .msi was extracted.
- 5. Double-click the .msi to begin the installation.

6. Review the End User License Agreement ("EULA"). If you agree to the terms, check the I Accept check box and click the Install button.

| 🙀 BizBroadcast Setup | |
|----------------------|--|
| | Please read the BizBroadcast License Agreement |
| | End User License Agreement |
| | NOTICE TO ALL USERS: PLEASE READ THIS AGREEMENT CAREFULLY. BY CLICKING THE "I AGREE" BUTTON AT THE BOTTOM OF THIS PAGE OR BY INSTALLING AND USING THE SOFTWARE, YOU AGREE TO ACCEPT ALL OF THE TERMS AND |
| | V I accept the terms in the License Agreement |
| Prin | : Bock Instal Cancel |

7. A dialog will open displaying the installation progress.

| 🕞 BizBroadcast Setup | | _ |
|---|--------------|--------|
| Installing BizBroadcast | BizBroadcast | |
| Please wait while the Setup Wizard installs E | izBroadcast. | |
| Status: | | |
| | | |
| | | |
| | | |
| | Beck Next | Cancel |

8. Click Finish when the installation completes.

| 🕞 BizBroadcast Setup | | _ |
|----------------------|---|--------|
| | Completed the BizBroadcast Setup Wizard | |
| | Click the Finish button to exit the Setup Wizard. | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | Back, Finish C | iancel |

Installing BizBroadcast for the Non-Administrative User

If you have installed BizBroadcast while logged in as a different login than the BizBroadcast end user, you will need to perform the following additional steps in order to get BizBroadcast functioning for this user.

1. While logged in as the administrative account used to install BizBroadcast, open Windows Explorer and browse to C:\Users\admin login\AppData\Local.



IMPORTANT

The AppData directory is a hidden directory. The easiest way to get to that directory is to type \AppData at the end of the path in the Windows Explorer window.

| C:\Users\Administrator\AppData | | | | |
|--------------------------------|-------------------------------------|-------------------|--|--|
| Organize 🔻 Include i | n library 🔻 Share with 💌 New folder | | | |
| 🔆 Favorites | Name | Date modified | | |
| 🧮 Desktop | 📙 Contacts | 3/30/2015 5:32 PM | | |
| 鷆 Downloads | 膧 Desktop | 3/30/2015 5:32 PM | | |
| 🕮 Recent Places | 📙 Downloads | 3/30/2015 5:32 PM | | |

- 2. Copy the BizBroadcast directory and paste it into the BizBroadcast user's C:\Users*user login*\AppData\Local directory.
- 3. Log out of the client workstation and log back in as the BizBroadcast user.
- 4. Open Windows Explorer and browse to C:\Users*user login*\AppData\Local\BizBroadcast\Bin.
- 5. Double-click the file named "Register BizBroadcast.bat".
- 6. If the workstation is running Windows 7 with User Account Control ("UAC") enabled, click **Yes** or **OK** to all UAC pop-ups.



ОK

When the .bat file completes, start Excel and continue with the next steps.

Additional Steps for Roaming Profile environments

Skip this step if profiles are <u>not</u> deleted on logoff. Go to <u>Delete existing User.config files</u> next.

By default, BizBroadcast is installed to the user's Local profile. If your company uses roaming profiles **and** locally cached copies of the profile are deleted on logoff, the BizBroadcast application will need to be moved to a non-profile directory and configured as follows.

1. Start Excel and load BizBroadcast by clicking on the **Load Broadcast** button on the BizBroadcast ribbon tab. This is an important step because it ensures that all first startup actions have been completed.



- 2. Close Excel.
- 3. Open Windows Explorer and browse to C:\Users\user login\AppData\Local.
- 4. Copy the BizBroadcast folder to a local drive on the user's workstation such as C:\.
- 5. Open the BizBroadcast folder in the new location, open the Bin directory and double-click the file named "Register BizBroadcast.bat".



This .bat file will need to be run each time the user logs into their workstation. A copy of this file can be placed in the user's Startup directory or the .bat can be tied to a login script.

6. In the Bin directory, locate and open the appSettings.config file with Notepad.

7. Change the Value of the BizBroadcastAdminPath setting to the new BizBroadcast folder.



8. Save the change and close the appSettings.config file.

Delete existing User.config files

Skip this step if BizBroadcast 2.3.1 or older has never been installed on the workstation. Go to <u>Step</u> <u>2: License your BizBroadcast Installation</u> next.

If an earlier version of BizBroadcast was installed (2.3.1 or older), the old user.config files need to be deleted; version 2.4 uses differently formatted .config files and does not replace/update user.config files that may already exist.

- 1. While logged in as the BizBroadcast user, open Windows Explorer and browse to %userprofile%\AppData\Local\Microsoft_Corporation.
- 2. Move any folder in the directory that is **not** named BizNet Software Shared or contains the word "BizInsight".



3. Browse to %userprofile%\AppData\Roaming\Microsoft_Corporation and move any folder that exists in the directory. It is not unusual for this directory to not exists but when it does, its contents need to be removed.

Step 2: License Your BizBroadcast Installation

BizBroadcast comes with a 45 day trial during which all capabilities are functional. Once the trial is expired or if BizBroadcast has been installed on the workstation before, the ribbon will only have a few buttons enabled until the product is activated.

| FILE | HOME | INSERT | PAGE LAYO | TUC | FORMULA | s D | ATA | REVIEW | VIEW | BizBroadcast |
|------------|------------------------------|-------------------------|---------------------|------------|--------------------|----------|-------|---|-------|--------------|
| Run Now | New Distribution Template | Application Settings | Email Settings S | Set Set | Scheduler START | Activate | 6 | Update Template Help Check for Update | About | Buy Now |
| | | Br | oadcast Re | port Dist | ribution an | d Schedu | uling | | | |

Click on the **Activate** button to open the **LicenseActivation** dialog and to begin the process of licensing the BizBroadcast product.

| icen | seActivaton | \otimes |
|-------|--|-----------|
| Basic | Advanced | |
| Onlin | e Activation | |
| E | Enter the Activation ID(s) | |
| Ē | Activate | |
| | Add Clear All | |
| Onlin | ne Deactivation | |
| Dead | tivate the current activation. Deactivate | |
| | | |
| | | Close |



License activation requires internet access. If internet access is not available or the activation call is being blocked, the License Activation dialog will not open. See "Manual License Activation" on page 13 for alternate instructions.

When a BizBroadcast order is processed, your license Activation ID is emailed to the individual named on the order:



If you are unable to locate that email, the Activation ID can also be found on the customer portal (<u>http://biznet.flexnetoperations.com</u>). Once logged into the portal, click on **Order History** on the left. If you have purchased multiple products, click on the entries until you locate the BizBroadcast entry.

| BizN | | | | |
|---|--|--|------|------------------------|
| Software & Services Home | Order Detail | | | |
| Order History Recent Files Posted Recent Email Notifications Resister Additional License | Click on the "Download" link next to the product Order Number: 602150327-4220-20483 | tto download it (only available when applicab 181 | (8). | |
| Tokens Devices | Order Date: Mar 30, 2015 PO Humber: | | | - |
| Search Devices Claim Device Upload Capability Request | + 1 BizBroadcast (PNE) | Manufacturer Part Number BI20201 | Ŷ | 10 AAAA-BBBB-CCCC-DDDD |
| Administration Ø | | | | |

Copy the Activation ID and paste it into the Enter the Activation ID(s) field and click on Activate ID(s).

| LicenseActivaton | \otimes |
|---|-----------|
| Basic Advanced | |
| Online Activation | |
| Enter the Activation ID(s) | |
| AAAA-BBBB-CCCC-DDDD | |
| Add Clear All | |
| Online Deactivation Deactivate the current activation. | |
| Deactivate | |
| | ose |

The Activation Success dialog will display.

| Activation Success | × |
|---|---|
| Thank you for the purchase of BizBroadcast (FNE). Your license has been successfully activated. | |
| ОК | |

Manual License Activation

In the event the workstation where BizBroadcast is installed does not have internet access or activation is being blocked, perform the following steps to manually activate the license.

1. On the BizBroadcast ribbon, click on the Activate button.



2. Click on the **Advanced** Tab.



3. Click on the Generate Request button.

| LicenseActivaton | \otimes |
|--|-----------|
| Basic Advanced | |
| Offline Activation/Deactivation Generate a license request. Generate Request | |
| Process the license response. | |
| Process Response | |
| man man h | man man |

4. Browse to a directory on the workstation, type a file-name and then click **Save**.

| 🚭 Save As | x |
|--|----------|
| ← → ▼ ↑ 📴 > This PC > OS (C:) > Temp 🗸 ঊ Search Temp 🔎 | > |
| Organize 🔻 New folder 🛛 🕅 🔻 | • |
| Intel Name | |
| junk No items match your search | |
| MSOCache | |
| PerfLogs | |
| Program Files | |
| Program Files (x86) | |
| ProgramData | |
| Reports | |
| Temp | > |
| | ÷, |
| File name: jsmith | <u> </u> |
| Save as type: Bin Files (*.bin) | ~ |
| Hide Folders Save Cancel |] |

- 5. Copy the resulting .bin file to an external drive or network directory and go to a workstation that has internet access.
- 6. Log in to the Customer Portal <u>http://biznet.flexnetoperations.com</u>.

| BizNet software | | | | | | |
|----------------------------|---|--|--|--|--|--|
| HOME > LICENSING AND DOWNL | DAD CENTER > LOGIN | | | | | |
| | Welcome to the BizNet Software Customer Portall Please log-in below to get started. | | | | | |
| | Login ID | | | | | |
| | Password | | | | | |
| | | | | | | |
| | Remember my password until I logout | | | | | |
| | Login | | | | | |
| | If you have forgotten your login ID, password, or are not sure whether you have an account, please use our Password Finder. | | | | | |
| | If you have questions about your account or need help setting one up, please contact our Support team via email at <u>biznet@flexmetoperations.com</u> or via phone by calling 1-888-715-4687 (within the U.S.) or 1-408-642-3965 (outside the U.S.). | | | | | |

7. On the left side, click on **Upload Capability Request**.



8. Browse to the .bin file generated on the client workstation. Click Send.



9. Click **Cancel** when prompted to save the resulting .bin file. This response file does not contain the BizBroadcast entitlement information.



10. Click on **Search Devices** on the left and click on the hyperlink of the Device just imported.

| 🛃 BizN | let software [®] |
|--|---|
| HOME > LICENSING AND DOWN | LOAD CENTER > SEARCH DEVICES |
| Software & Services Home Order History | Search Devices These are the devices assigned to your account. You may fill out additional criteria t |
| Recent Files Posted Recent Email Notifications Register Additional License Tokens | Device ID Activa Alias |
| Devices | |
| Search Devices | Filter |
| Claim Device | _ |
| Upload Capability Request | 🔣 🔇 🚺 to 2 of 2 📎 刘 🛛 Entries per page: 25 💌 |
| Administration 🌣 | |
| Account Administrators | Device ID Alias |
| Allocation Accounts | LDAVISPC\ldavis-B2EBF7F4-BFEBFBFF000306A9 |
| Account Members | WIN-ND4T13I07UH\linda-AACCFDC3-1FEBFBFF000306A9 |
| Change Password | |
| Email Preferences | |

11. Click Map Add-Ons.

| View Device | | | | | | | | |
|--|---|-----------|--------------|------------|--------------------|--|--|--|
| Device ID Alias | WIN-ND4T13I07UHIInde-AACCFDC3-1FEBFBFF000306A0 | | | | | | | |
| Status Series Model Virtualization Virtualization Details | ACTIVE FLX_CLIENT_BERIES FLX_CLIENT VMware VMm | | | | | | | |
| Vendor Dictionary | (None) | | | | | | | |
| Add-Ons | Update Alias Nao Add-Ons Remove Add-Ons Return Device View History Move Device Download Casability Resource Add-Ons | | | | | | | |
| Add-On Name | Status | EntSenent | Units Mapped | Expiration | Downloadable Items | | | |
| No add-ons are i | No add-ons are currently mapped. | | | | | | | |
| | | | | | | | | |

12. The Map Add-Ons dialog will open.

This dialog displays all entitlements of products that use this licensing method. Check that the **Available Units in Line Item** is not zero and enter "1" for the **Qty to Add** field. Click the **Map Add-Ons** button.

| Device ID | WIN-ND4T13I07UHWinda-AACCFDC3-1FEBFBFF000306A9 | | | | | | | |
|-----------------------|--|---|--------------|---------------------------------|-----------------------------|--|------------|--|
| ID Type Alias |)Type STRING Bias | | | | | | | |
| Add-On Name | Activation Code | Entitlement | Expiration | Available Units in Line Item | Total Units in Line Item | Maximum Add-On Units Allowed on Device | Gty to Add | |
| BizBroadcast (FNE) | 100 (Fig. | BIZ150327-4220-2 048351 (121745161) | Mar 30, 2016 | 9 | 10 | 9 | 1 | |

13. Click on the **Download Capability Response** link.

| View D | Device | | | | |
|---------------------------|----------------------------|--------------------------|-----------------------|--------------|-------------------|
| The add-ons w | vere successfully mapped. | | | | |
| Device ID | 101-101-011-011-010-00-000 | 71C1 (108987100.0044 | | | |
| Alias | | | | | |
| Status | ACTIVE | | | | |
| Series | FLX_CLIENT_SERIES | | | | |
| Model | FLX_CLIENT | | | | |
| Virtualization | VMware | | | | |
| Virtualization Details | View | | | | |
| Vendor Dictionary | (None) | | | | |
| | Lindate Alias | | | | |
| | opunce Anap | | | | |
| Map Add-Ons | Remove Add-Ons Return Dev | ice View History Move De | nice Download Capabil | ity Response | |
| Add One | | | | | |
| Add-Ons | | | | | |
| Add-On Name | Status | Entitlement | Units Mapped | Expiration | Downloadable tems |
| BizBroadcast (FN8 | E) License not generated | BZ150327-4220-204030 | 1 | Mar 30, 2016 | Mew |
| | | (121745151) | | | |

14. Copy the response file (.bin) to the external drive or network location then go back to the client workstation.

15. Click on the **Activate** button on the BizBroadcast ribbon.



16. Go to the **Advanced** tab and click on the **Process Response** button.

| Licen | seActivaton | \otimes |
|----------------|---|-----------|
| Basic | Advanced | |
| Offlir Gene | e Activation/Deactivation rate a license request. enerate Request | |
| Proc | ocess Response | |
| <u> </u> | and man from the second | ~ min |

17. You will get a message that the product was successfully activated.



18. If Activation continues to fail, contact BizNet Software Support, <u>www.biznetsoftware.com/support/</u>.

Step 3: Check the Installation

- 1. Open Excel.
- 2. Confirm that the BizBroadcast tab is displayed on the ribbon.



3. Click on the **Load Broadcast** button on the BizBroadcast tab to load BizBroadcast and enable all buttons.



4. Click on the **New Distribution Template** button. A new tab should be inserted into Excel named **Broadcast List**.

| FILE | | HOME | INSERT | PAGE LAYOUT | T FORMULAS | DATA | REVIEW | VIEW | BizBroadcast |
|------------|----|----------------------------|---------------------------------------|---|---|-------------|--------------------------------|------|--------------|
| Run Now | Ne | w Distribution Template | Application Settings BizBroadca | Email Si Settings Sche st Report Distri | et Scheduler A dule STOP buttion and Schedu | ctivate 🕅 A | heck for Updat Ielp bout | es | |
| B20 | | | * ; ; | $\times \checkmark f$ | e _x | | | | |
| 35 | | | А | | 8 | | с | | D |
| | 1 | | | | | | | | |
| | 2 | | | | | | | | |
| | 3 | BizBroade | ast Distrib | urtion List | | | | | |
| | 4 | R | equired | | At lea | st one requ | uired | | |
| | 5 | RenderFo | ormat | Path | | E | mailTo | | EmailSubject |
| | Б | XLSX | | | | | | | |
| | 7 | | | | | | | | |
| | 8 | | | | | | | | |
| | g | | | | | | | | |

If the below error occurs, the workbook is in the old Excel 97-2003 (.xls) format. Save the workbook as a .xlsx and then close and reopen it to resolve the error.



5. The BizBroadcast installation is complete.