Configuration of a Synthesis Multi-User Workstation

Last Update: 8/16/2012

ReliaSoft® CORPORATION

TABLE OF CONTENTS

Section 1   PROCESS OVERVIEW

This document provides instructions for installing and configuring ReliaSoft Synthesis applications on a multi-user workstation. To do so, you must have a Product License Key that specifically permits multiple users to access the same Synthesis applications on the same shared computer. This is called a "Workstation License."

The general steps for configuring a multi-user workstation are outlined next. They vary somewhat depending on whether you are working in a domain environment (i.e., the workstation is connected to a network) or a local environment (the workstation is not connected).

1. Create a user account called "RSWorkstation" that has administrative privileges for the workstation computer. With a Workstation License, an administrator account with this specific name must be used to activate the software on behalf of all other users.
    a. If you are working in a domain environment, request assistance from your systems administrator.
    b. If you are working in a local environment, you can follow the instructions in Section 2.
2. Create a standard user account for each person who will use the software on the workstation.
    a. If you are working in a domain environment, the applicable user accounts may already be created. If not, request assistance from your systems administrator.
    b. If you are working in a local environment, you can follow the instructions in **Section 2** to create each account directly on the workstation computer.
3. Create a Windows user group (aka "security group") that contains all the users who are eligible to access the software on the workstation.
    a. If you are working in a domain environment, request assistance from your systems administrator to create the group on the network.
    b. If you are working in a local environment, you can follow the instructions in Section 4.1 to create the group directly on the workstation computer.
4. Log in to the workstation computer as the RSWorkstation administrator, then:
    a. Run the Synthesis installation and activate each of the applications that will be used on the workstation.
        i. For activation, you must have the Product License Key and you must be able to access the e-mail account that is associated with the license. For instructions, see Section 3.1 and Section 3.2.

    b. Assign the required permissions for the Synthesis License folder. This will allow all users in the Synthesis user group to run the software without having to install or activate it themselves.

        i. For Windows Vista or Windows 7, the folder is located at **C:\Users\RSWorkstation\AppData\Roaming\ReliaSoft\License**.

        ii. For Windows XP, it is **C:\Documents and Settings\ RSWorkstation\Application Data\ReliaSoft\License**.

The following permissions must be granted to the Synthesis user group for this folder: **Read & execute**, **List folder contents**, **Read** and **Write**.

For instructions, see Section 4.2.

If you will be configuring more than one multi-user workstation in a domain environment, step 4 above must be repeated for each workstation. If you are working in a local environment, all the steps will have to be repeated on each computer.

If you encounter any issues during the configuration of this workstation or while using the Synthesis applications, please refer to Section 7 for troubleshooting information.

Section 2   CREATING THE "RSWORKSTATION" AND OTHER USER ACCOUNTS

In order to use a Synthesis Workstation License, a user account called "RSWorkstation" (this specific name is required) must log in to the workstation computer <u>as an administrator</u> to activate the software on behalf of other users who will log in to the workstation via standard user accounts.

Domain Environment: If you are working in a domain environment, request assistance from your systems administrator to create the new RSWorkstation administrator account and any other standard user accounts that may need to be created.

Local Environment: If you are working in a local environment, the following instructions will guide you through the creation of a local RSWorkstation administrator account on Windows Vista or Windows 7. For Windows XP users, the process is very similar and any significant difference will be noted in the instructions.

- Open the Manage Accounts window from the taskbar by choosing **Start > Control Panel > All Control Panel Items > User Accounts > Manage another account**. (This path may differ slightly depending on your **View by** setting.)

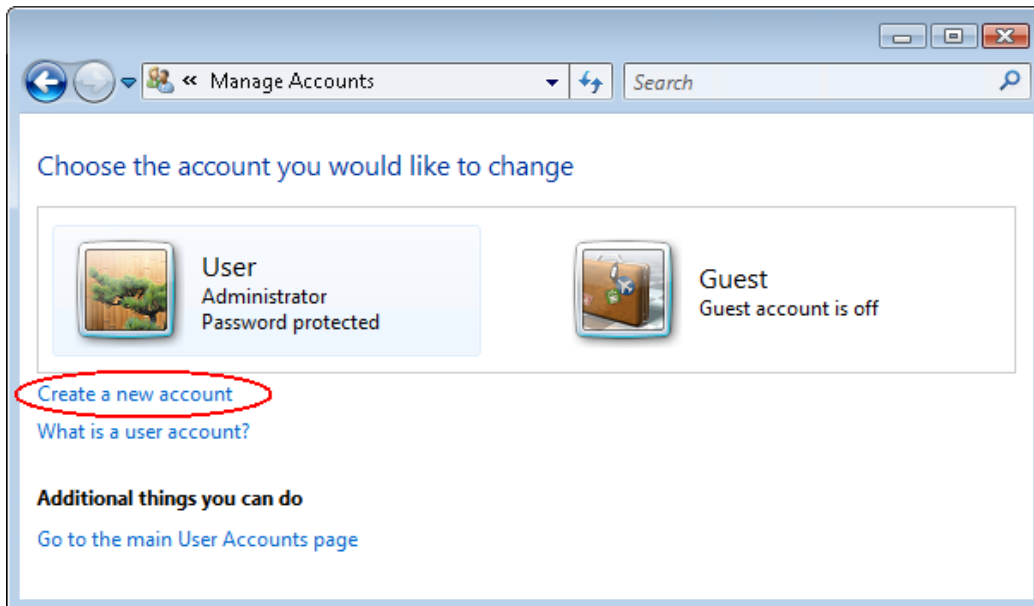 In the Manage Accounts window, click **Create a new account**.

Figure 1: Manage Accounts

- In the Create New Account window, enter **RSWorkstation** for the account name, then select **Administrator**. Click **Create Account**.
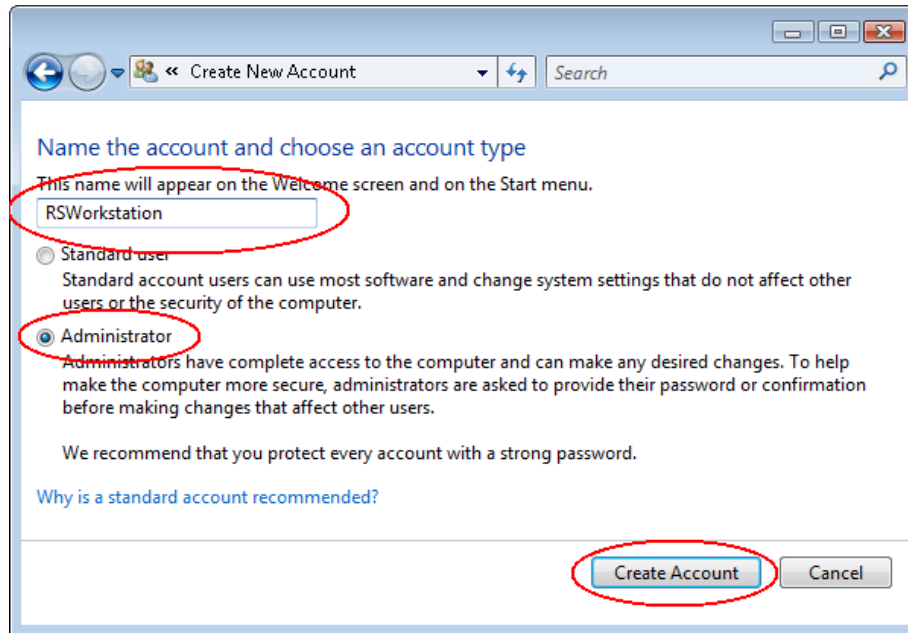

Figure 2: Create New Account

Note: Windows XP users will enter the new account name and click **Next**. In the following window, set the user to **Administrator** and then click **Create Account.**

- You will automatically return to the Manage Accounts window and the newly created user account will appear as shown next.
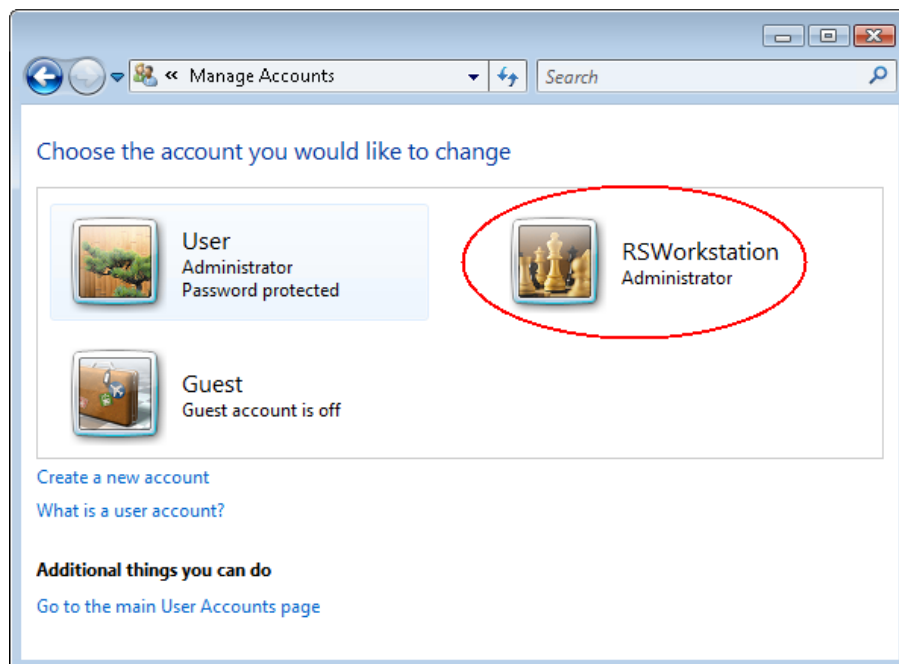

Figure 3: Newly Created RSWorkstation Account

- To set the password, click the **RSWorkstation** account icon to open the Change an Account window.

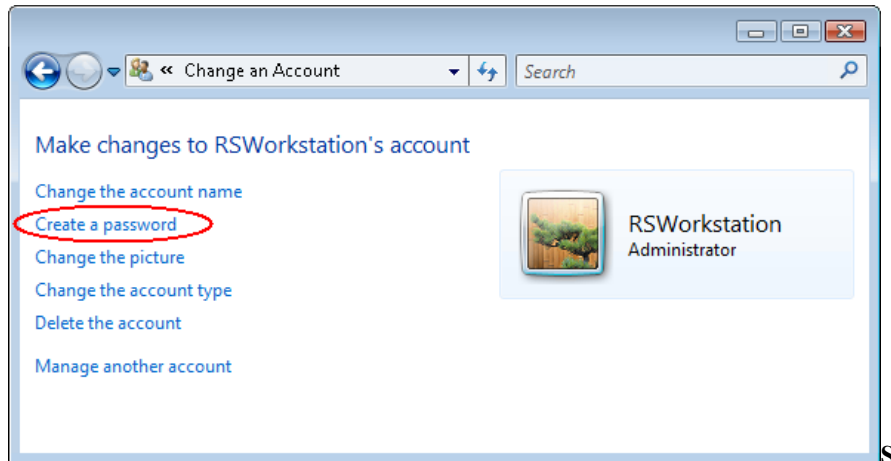- In the Change an Account window, click **Create a password**.

Figure 4: Change an Account

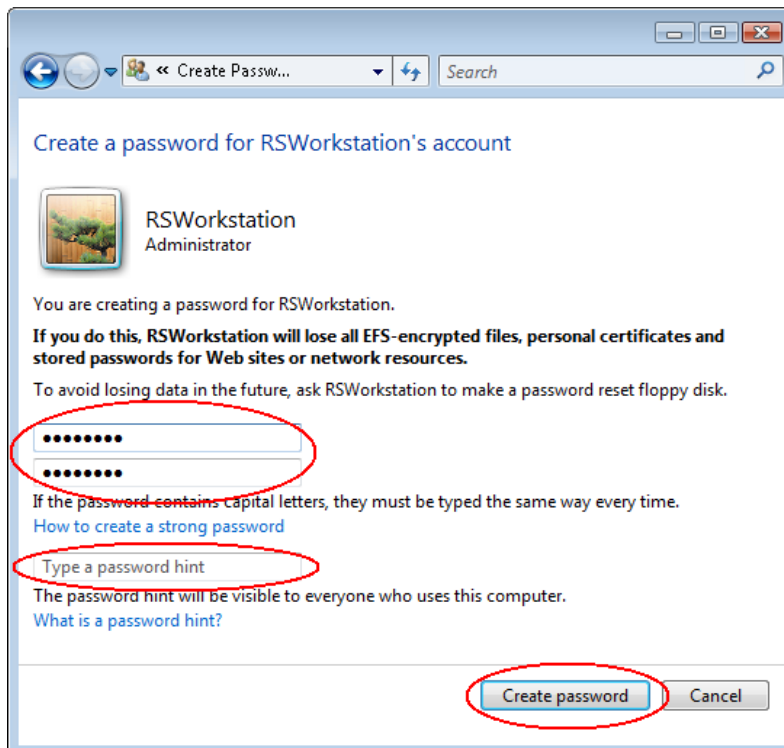- Enter the required information and click **Create password**.

Figure 5: Create Password

- Repeat steps similar to the above to create standard user accounts and assign passwords for all non-administrator users who will have access to the software on this workstation.

Section 3   INSTALLATION AND ACTIVATION

This section provides instructions for installing and activating the software. Note that the installation can be performed by any administrator, but the activation can only be performed by the "RSWorkstation" administrator.

Section 3.1   INSTALLATION

Follow these steps to install the software.

- Log in as a user with administrator privileges.
- Close all other open applications.
- Launch the installation program you received from ReliaSoft and follow the prompts to install the software.

Section 3.2   ACTIVATION

The following steps must be performed by the RSWorkstation administrator before any other regular user attempts to access the software. (If you are logged in as another user, your Workstation License will not allow you to activate.) You must repeat this process for each Synthesis application that will be used on the workstation.

- Log in as the RSWorkstation administrator, if you have not already done so.
- The first time you run each application after installation, the activation wizard will appear. At the "What would you like to do?" prompt, select **Activate a license** and click **Next**.
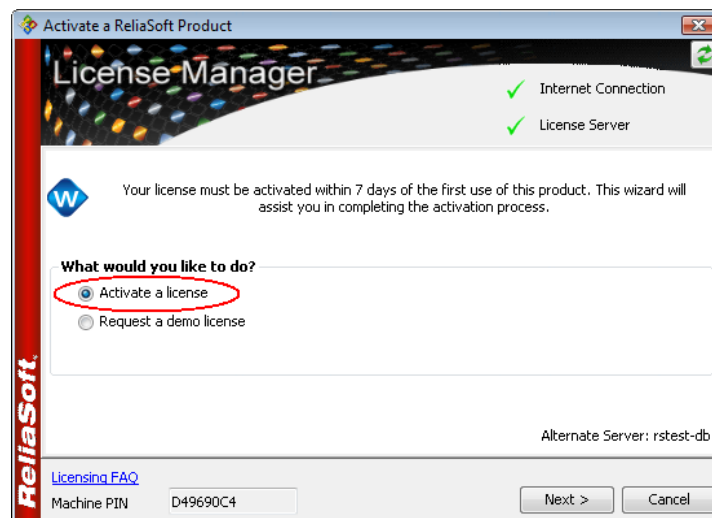

Figure 6: Activating a License

- When your institution purchased the Workstation License, it provided an e-mail address to be associated with your Product License Key. Enter this address, and make sure you have access to it during activation. Click **Next**.
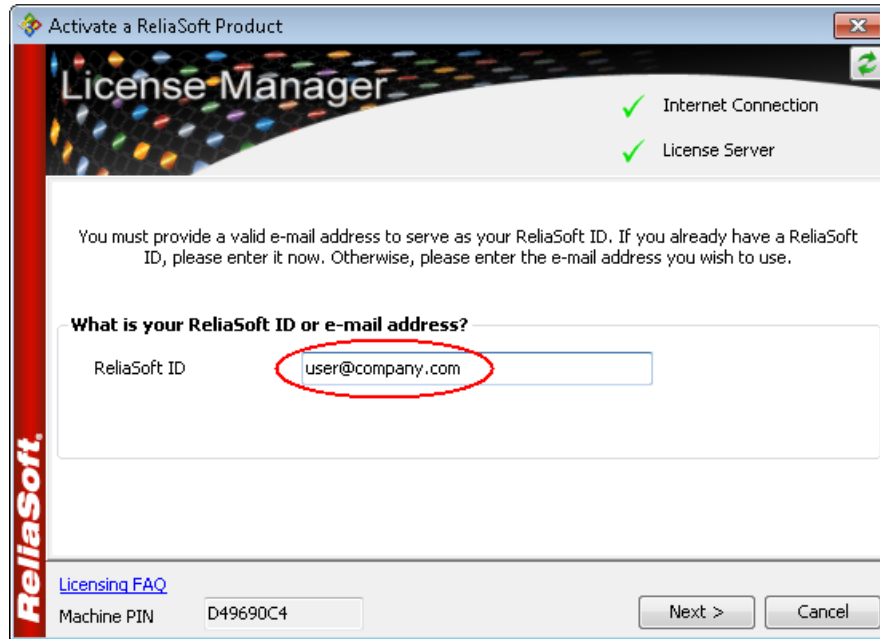

Figure 7: Activation E-mail Address

- If this is the first time that you have activated a Synthesis application with this e-mail address, the next page will request your name and basic contact information. Enter the requested information and click **Next**.
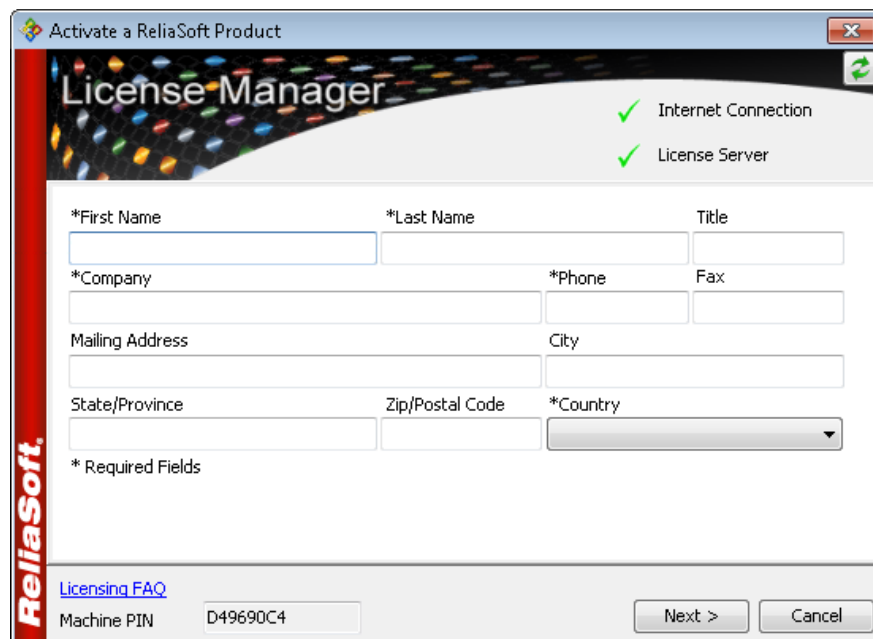

Figure 8: Contact Information

- On the next page, enter the Product License Key and click **Next**. If you copy the key from a product delivery e-mail, you can click the **Paste** icon to automatically enter all sections of the key into the appropriate fields.
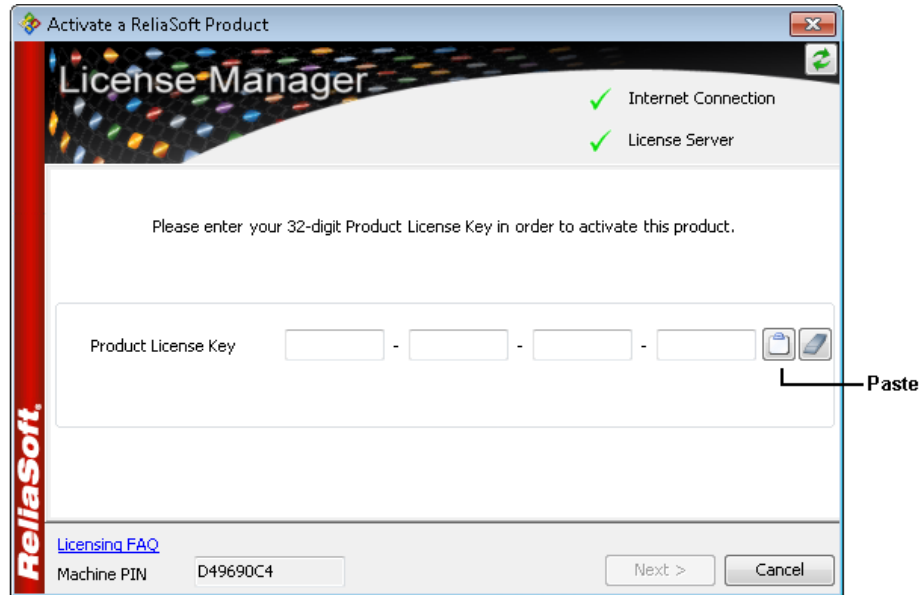

Figure 9: Product License Key

- A Confirmation Key will be sent to the specified e-mail address. On the next page of the wizard, copy/paste the key and click **Next**.
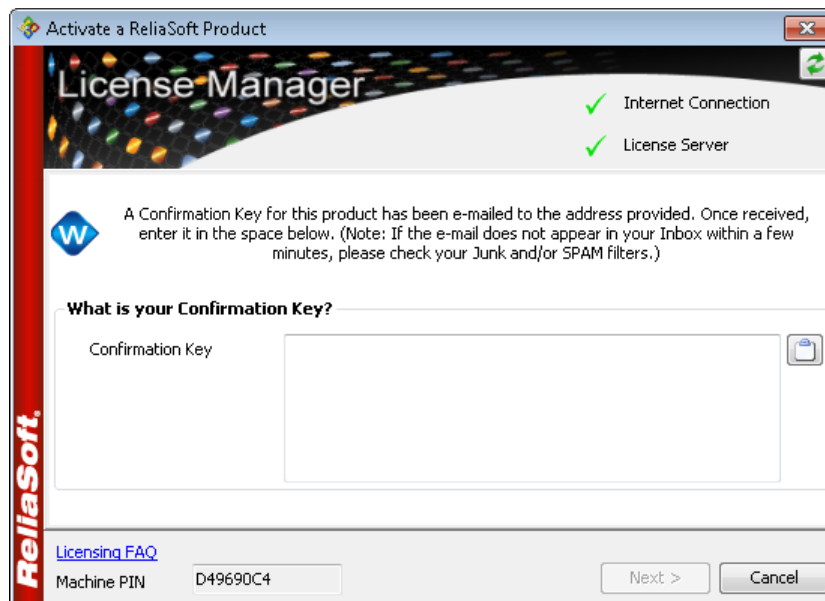

Figure 10: Confirmation Key

- Click **Finish** to complete the process. Repeat these steps for each Synthesis application on the workstation.

Section 4 SETTING PERMISSIONS FOR THE LICENSE FOLDER

This section provides instructions for establishing a Windows user group (aka "security group") that contains all of the regular users who are eligible to access the software. You will use the group to grant the necessary permissions for the Synthesis License folder on the workstation computer. This will allow users in the group to run the software without having to install/activate it themselves.

Domain Environment: If you are working in a domain environment, request assistance from your systems administrator to create the new user group and assign all eligible users to that group. Then proceed to Section 4.2 for instructions on how to set the folder permissions on the workstation.

Local Environment: If you are working in a local environment, Section 4.1 provides instructions for creating the user group and assigning users directly on the workstation computer. Then proceed to Section 4.2 for instructions on how to set the folder permissions.

Before continuing, please note that all users who are provided access to the software must be permitted access according to the license agreement for your Workstation License. If you aren't sure which users are permitted access according to the license agreement, please check the EULA addendum you received with this document or contact ReliaSoft by going to http://www.ReliaSoft.com/contact.htm.

Section 4.1 CREATING A USER GROUP

If you are working in a local environment, this section explains how to create a user group directly on the workstation and assign all users who are eligible to access the Synthesis applications. If you did not create all your regular user accounts when you created the RSWorkstation administrator account, you can add them now. See Section 2.

- To open the Computer Management window, click the Windows **Start** icon on the taskbar. On the right side of the Start Menu, right-click **Computer** and choose **Manage** on the shortcut menu.

  Note: Windows XP users can access the Computer Management window by choosing **Start > Programs > Administrative Tools > Computer Management**.
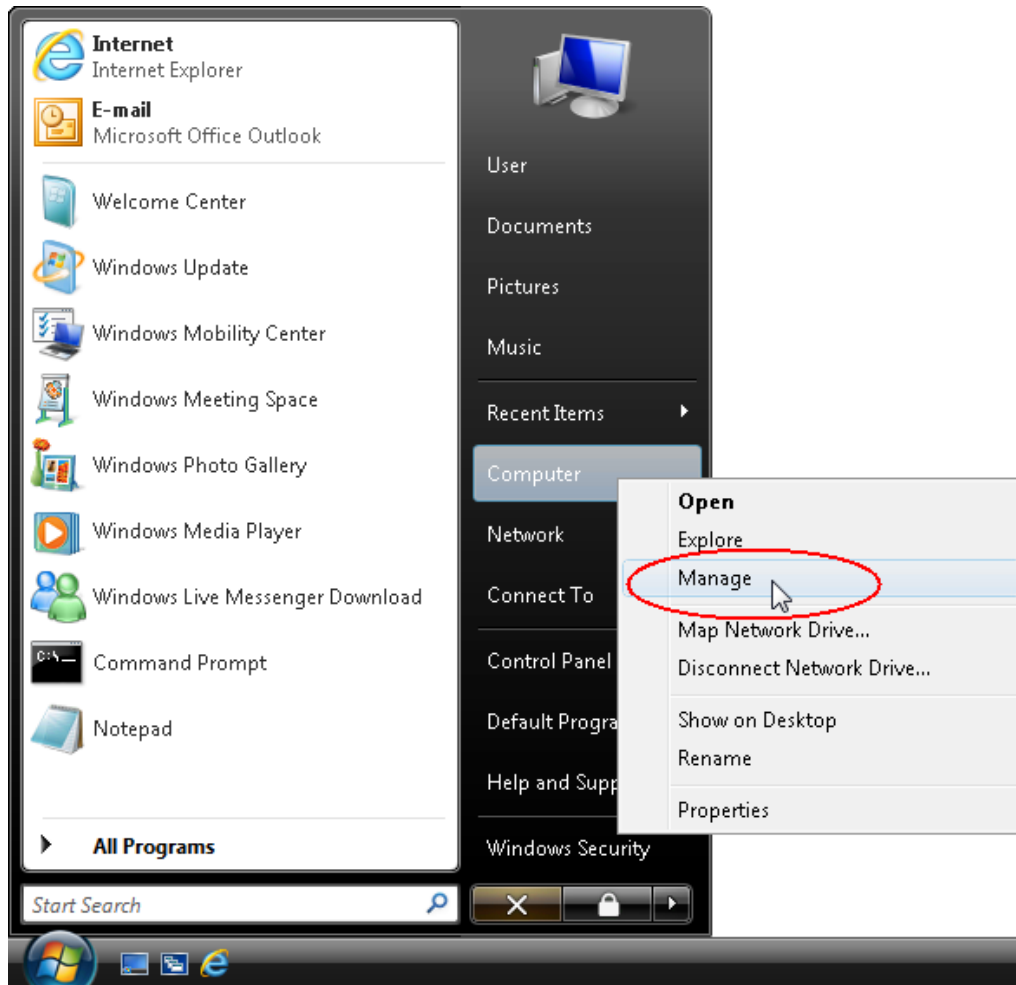

Figure 11: Open Computer Management Window

- Double-click the **Local Users and Groups** header in the navigation panel on the left side of the Computer Management window. To create a new user group, right-click the **Groups** folder and choose **New Group** on the shortcut menu.
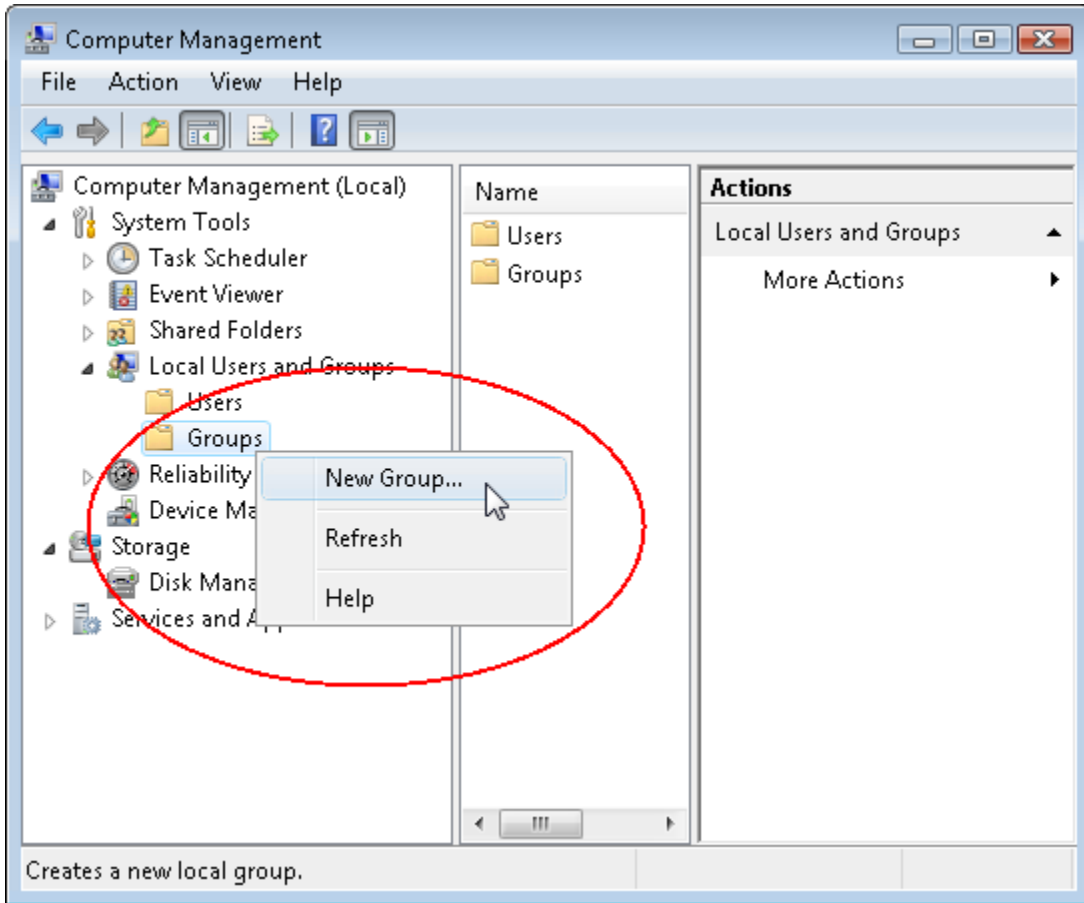

Figure 12: Computer Management Window

- In the New Group window, enter the required information and click **Add**. In this example, we will use "Synthesis" as the group name.
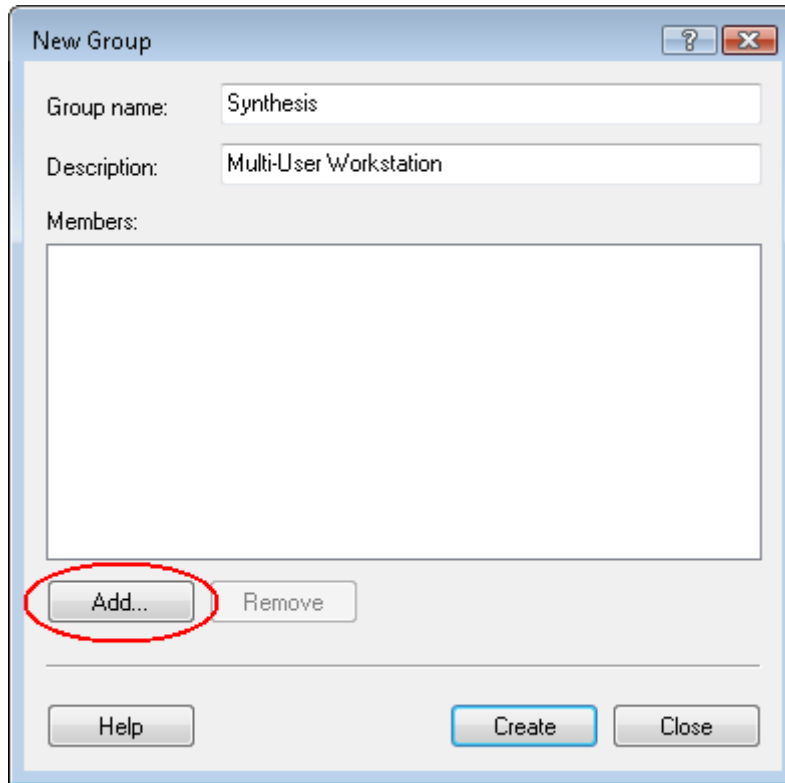

Figure 13: New Group Window
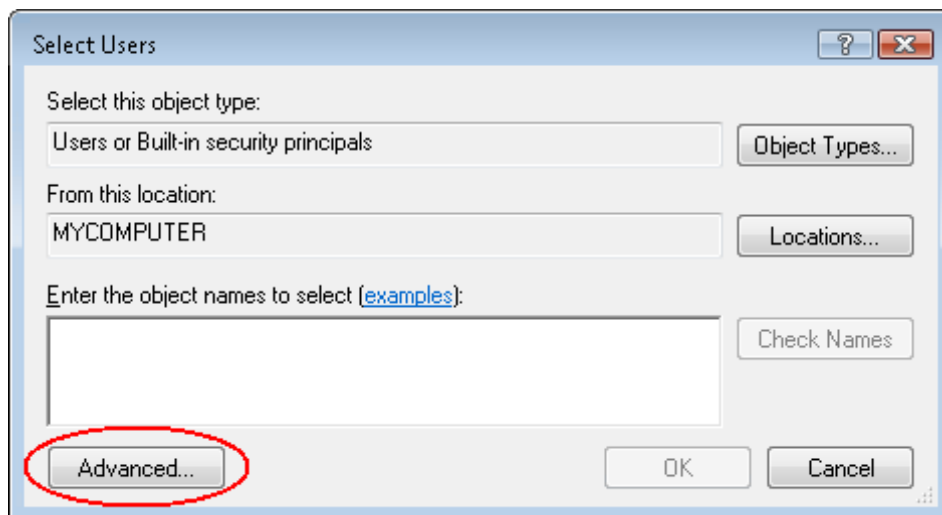
- In the Select Users window, click **Advanced**.

Figure 14: Select Users Window

- In the window that appears, make sure your local computer name is in the **From this location** field, then click **Find Now**. All the available users will appear in the **Search results** area. If you have multiple users to select, press the **CTRL** key while you select different users. Once you've selected all the users who will run Synthesis applications on the workstation, click **OK**.
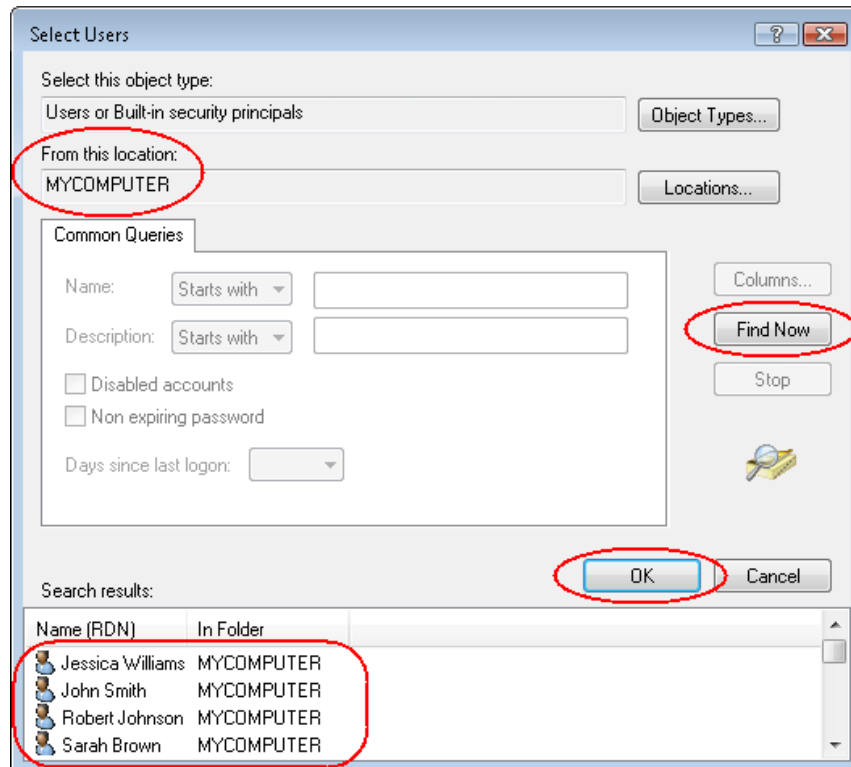

Figure 15: Selecting Users Who Will Be Added

- When you return to the Select Users window, all your selected users should be visible in the **Enter the object names to select** area. Keep in mind that as you add authorized Synthesis users to this workstation in the future, they will also need to be added to this group. Click **OK**.
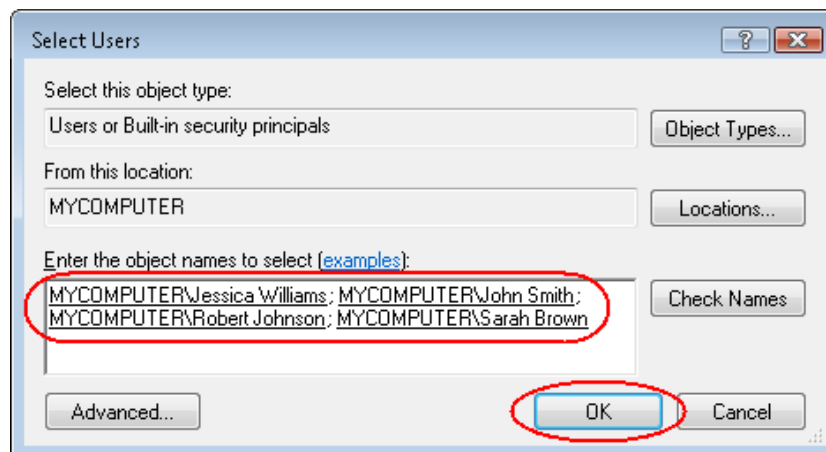

Figure 16: Confirming Users Who Will Be Added

- When you return to the New Group window, click **Create** and then **Close.**
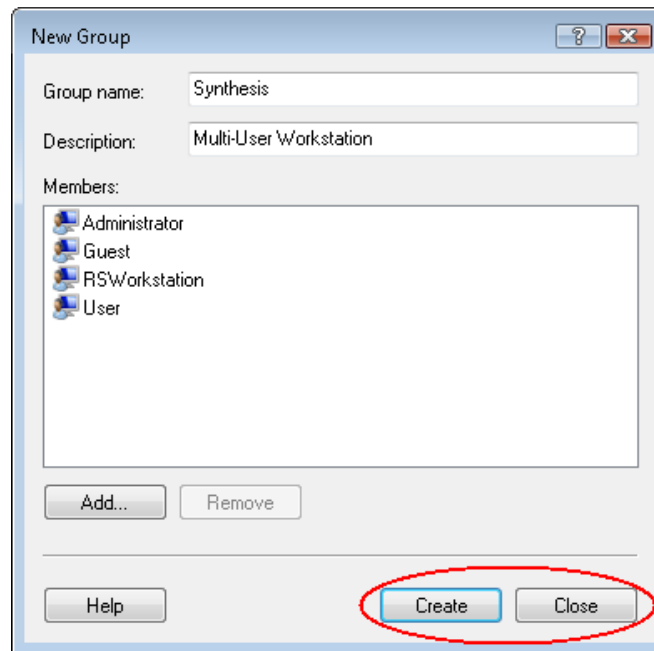

Figure 17: Creating the Group

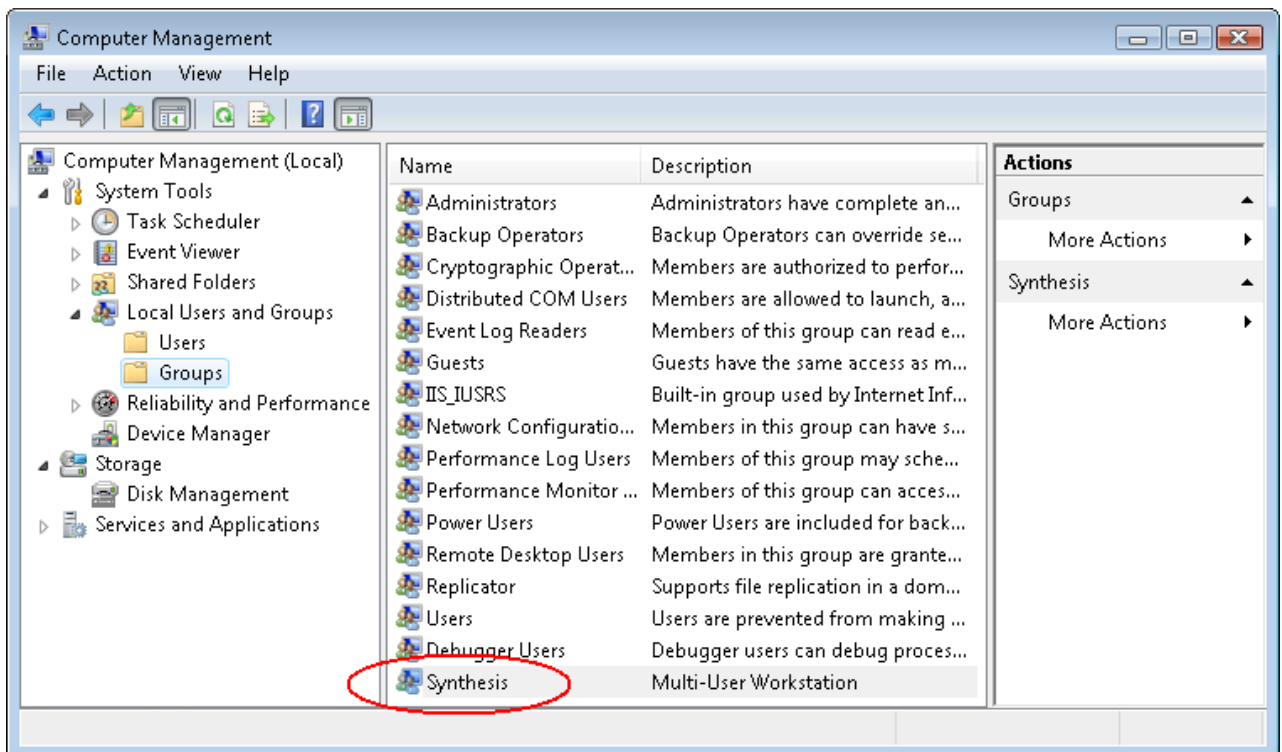- The new user group will be visible in the Computer Management window.

Figure 18: Computer Management Window After Adding the Synthesis Group

Section 4.2   SETTING FOLDER PERMISSIONS

This section explains how to set the necessary permissions for the Synthesis License folder on the workstation.

- After Synthesis has been installed/activated on the workstation (Section 3), log in as the RSWorkstation administrator (or another administrator account).

- Open the Windows Explorer by choosing **Start > Computer** from the taskbar.

- For Windows Vista or Windows 7, navigate to **C:\Users\RSWorkstation\AppData\Roaming\ReliaSoft**.

  For Windows XP, go to **C:\Documents and Settings\ RSWorkstation\Application Data\ReliaSoft**.

  Tip: If you cannot see the "AppData" folder (or "Application" folder for Windows XP), your view options may be set to not show hidden files and folders. To enable this option, press the **ALT** key, then choose **Tools > Folder Options**. In the **Advanced settings** area of the View tab of the Folder Options window (not shown), select **Show hidden files, folders, and drives**. Click **OK**.

- Right-click the "License" folder and choose **Properties** on the shortcut menu.
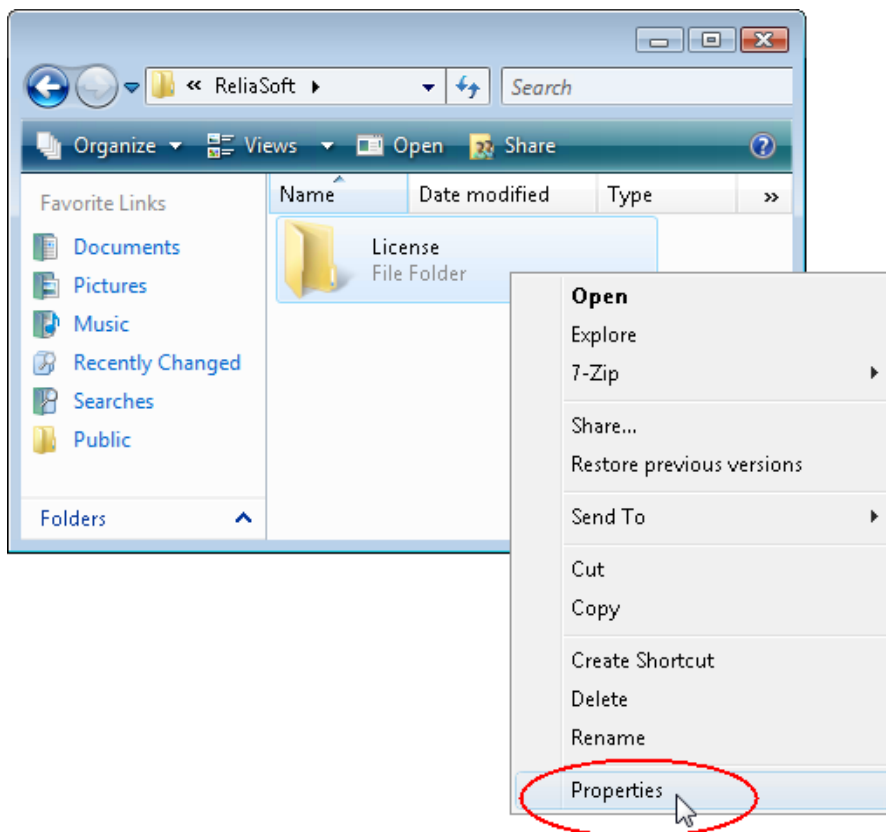

Figure 19: Changing Folder Properties

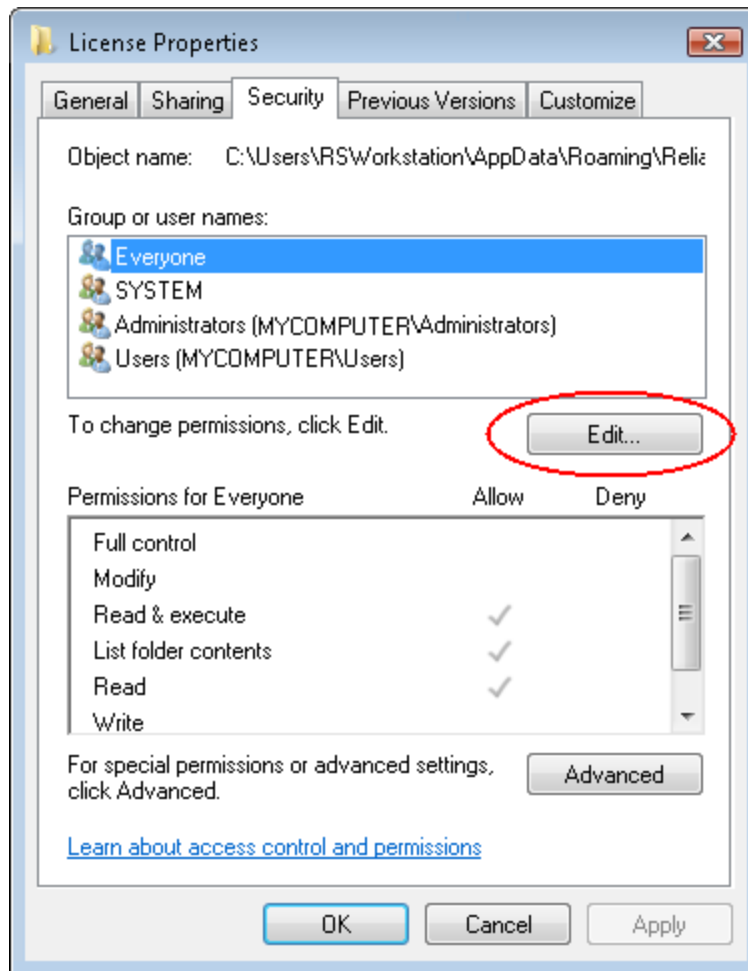- On the Security tab of the License Properties window, click **Edit**.

Figure 20: License Properties Window

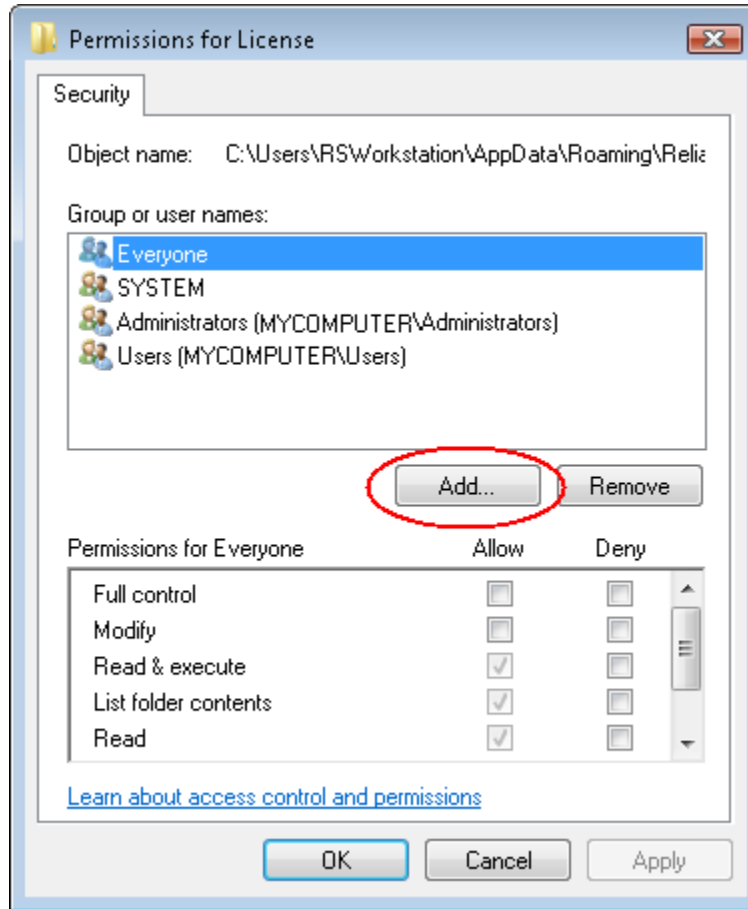- In the Permissions for License window, click **Add**.

Figure 21: Permissions for License Window

- In the window that appears, ensure that your computer name is in the **From this location** field and click **Advanced**.
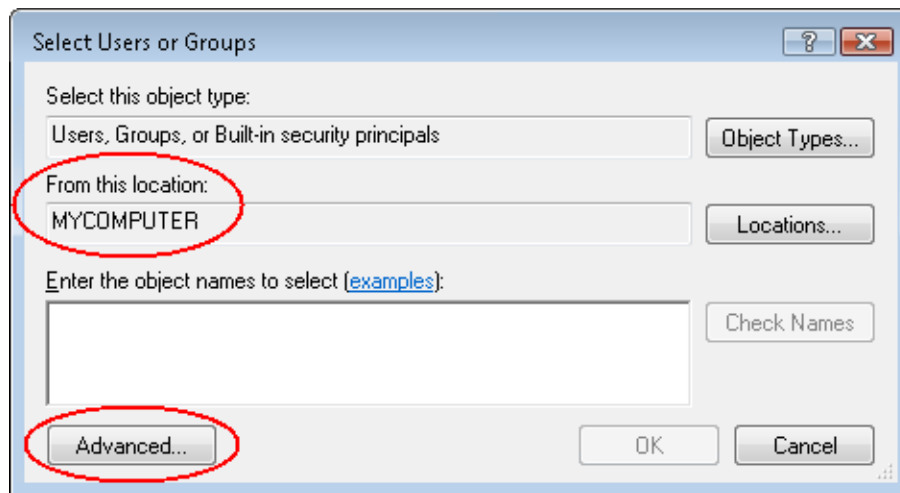

Figure 22: Select Users or Groups Window

- In the next window, click **Find Now** and you will see the found items in the **Search results** area.

- Scroll the **Search results** area until you find the Synthesis user group (in this example, it is called "Synthesis"). Select that group and click **OK.**
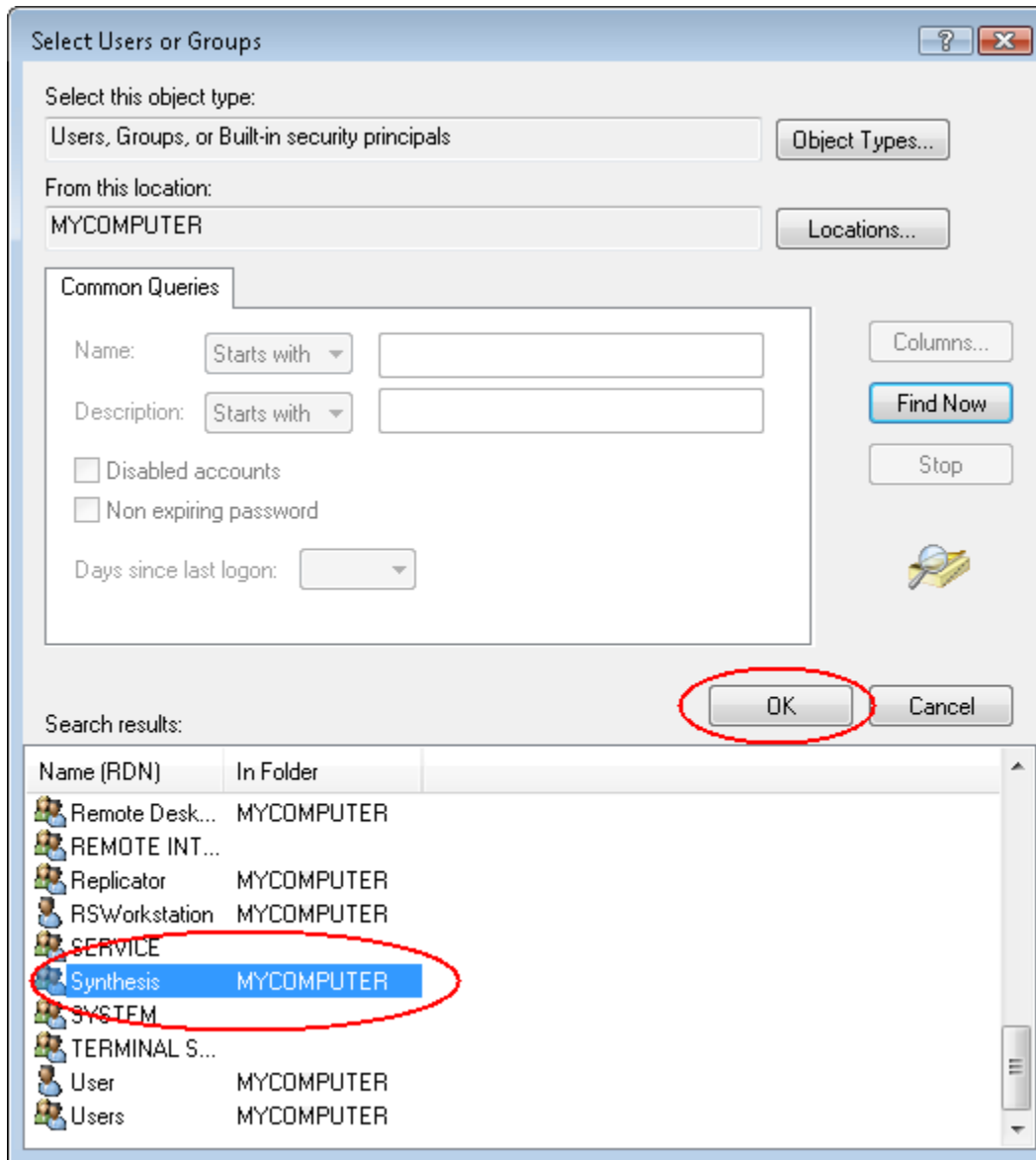

Figure 23: Select Synthesis User Group

- The window that appears (not shown) will show the Synthesis group in the **Enter the object names to select** area. Click **OK**.

- When you return to the Permissions for License window, select the following permissions for the Synthesis group: **Read & execute**, **List folder contents**, **Read** and **Write**. Click **OK**.
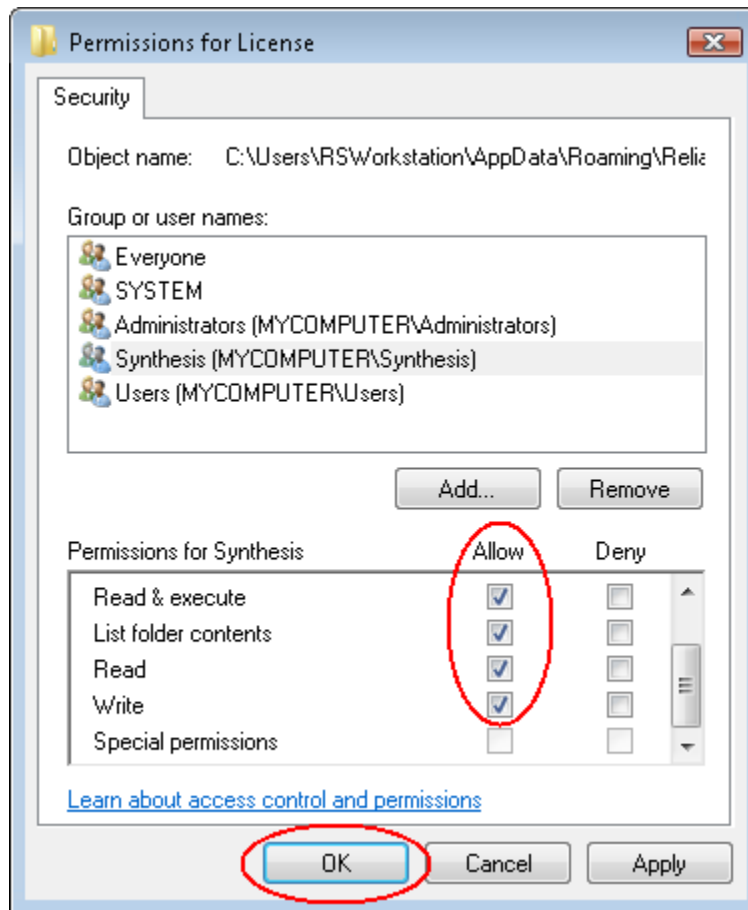

Figure 24: Setting the Synthesis Group's Permissions for the License Folder

- You will return to the Security tab of the License Properties window, and the Synthesis user group will show in the **Group or user names** area. Click **OK**. You have now provided the correct permissions necessary for members of the Synthesis user group to run Synthesis applications on this multi-user workstation.
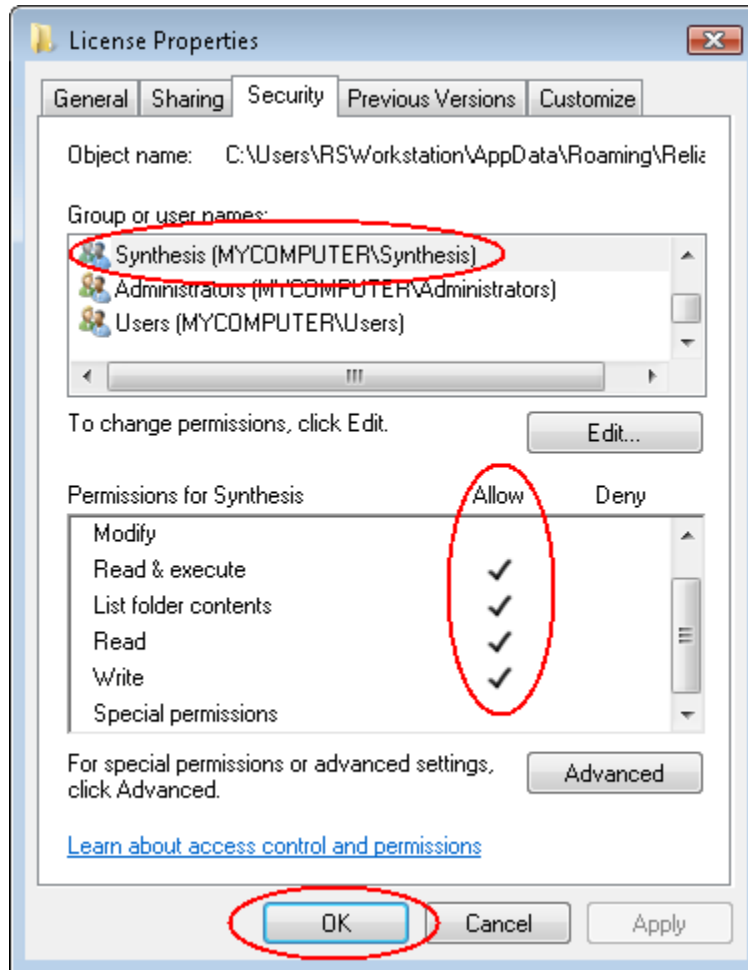

Figure 25: License Properties Showing the Synthesis Group

Section 5 USING SYNTHESIS ON YOUR WORKSTATION

All the users in the Synthesis user group can now run the Synthesis applications on the workstation by double-clicking the desktop icons (if you opted to create them during installation) or by choosing **Start > All Programs** from the taskbar and launching the software from the ReliaSoft folder.

Although you can use the RSWorkstation administrator account to run the Synthesis applications, it is highly recommended to implement the RSWorkstation account only as an administrator for this workstation, and require users who run Synthesis to log in under different, non-administrator accounts.

Section 6 UNINSTALLING SYNTHESIS

If you no longer wish to use this computer as a Synthesis multi-user workstation, you will need to do the following:

- Log in as the RSWorkstation administrator and launch any Synthesis application.

- Choose **File > Help**, then click the **License Manager** link in the **Licensing** area. You may be prompted for a password, which is optional for these purposes. Click the **Deactivate** button. The application will close.

- Repeat the above steps to deactivate all other Synthesis applications installed on the workstation.

- Uninstall ReliaSoft Synthesis 8 by choosing **Start > Control Panel > All Control Panel Items > Programs and Features**. (The exact path may differ depending on your **View by** setting.)

  Note: Windows XP users should choose **Start > Control Panel > Add/Remove Programs**.

You have now deactivated and uninstalled Synthesis from this workstation, which allows you to activate the Workstation License on another computer. Of course, you can also install and activate any non-Workstation License on this computer. However, because the RSWorkstation administrator account is intended for use with Workstation Licenses only, you cannot install a non-Workstation License while logged in as RSWorkstation.

Section 7 TROUBLESHOOTING

This section has been provided to help you resolve some of the more common issues or errors encountered while installing, activating or launching ReliaSoft Synthesis applications in a multi-user workstation environment.

If you still need assistance, you can find contact information for the office that provides localized support for your region by going to http://www.ReliaSoft.com/ help.htm. Regardless of your location, you can always contact ReliaSoft's Corporate Headquarters in Tucson, Arizona.

Problem: You try to run the ReliaSoft Synthesis installation and receive the following error:
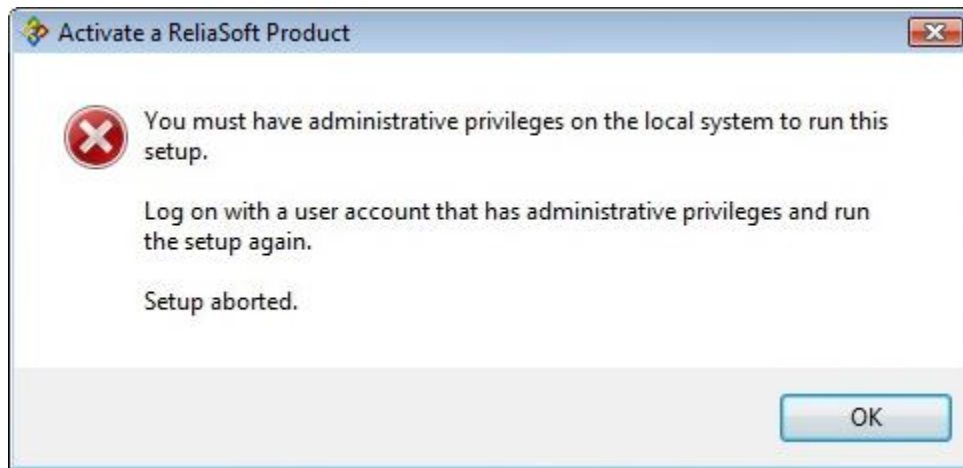

Figure 26: Missing Administrative Privileges Error

Solution:

* The user you are logged in as does not have administrative privileges. Log in using the RSWorkstation account or any account with administrative privileges. See Section 2 for instructions on creating the RSWorkstation account.

Problem: You have logged in at the workstation and launched a Synthesis application. You are immediately presented with the "What would you like to do?" area of the activation wizard.
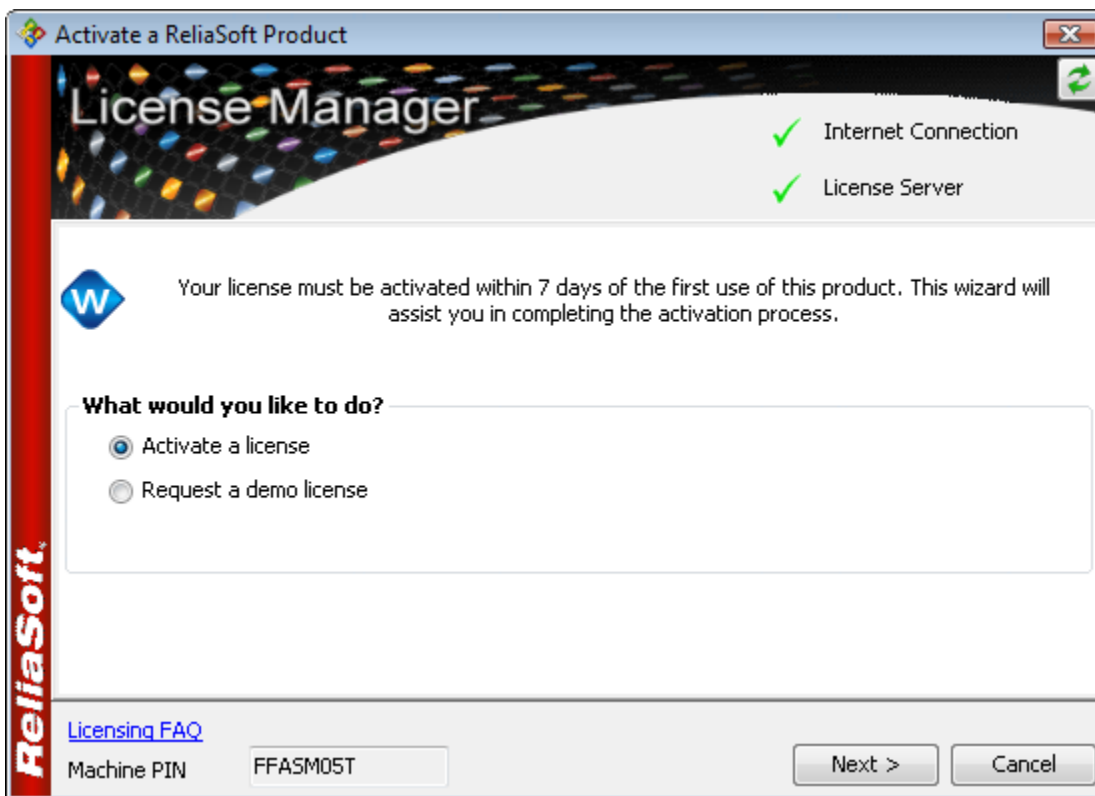

Figure 27: "What Would You Like To Do?" Area of the Activation Wizard

Solution: This can occur for two reasons:

- The application has not been activated by the RSWorkstation administrator. Log in as RSWorkstation, launch each Synthesis application and confirm that all applications have been activated. See Section 3.2 for details.

  or:

- The application has been activated by the RSWorkstation administrator, but the current user has not been added to the user group required for access to the software. Log in as an administrator and add the current user to that group as described in Section 4.1.

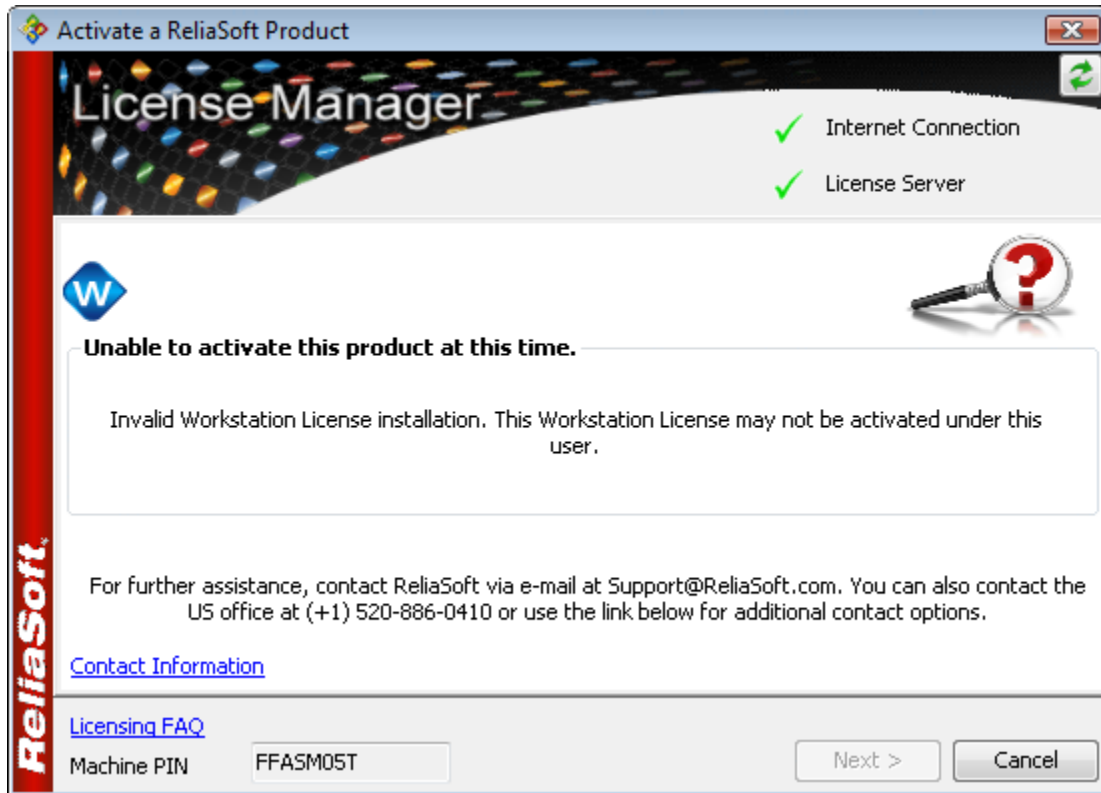**Problem: You receive the following message after entering your Product License Key in the activation wizard:**

Figure 28: License May Not Be Activated Under Current User

Solution:

- You are attempting to activate your application using a user account other than the RSWorkstation administrator account. Log in as RSWorkstation and try again to activate.

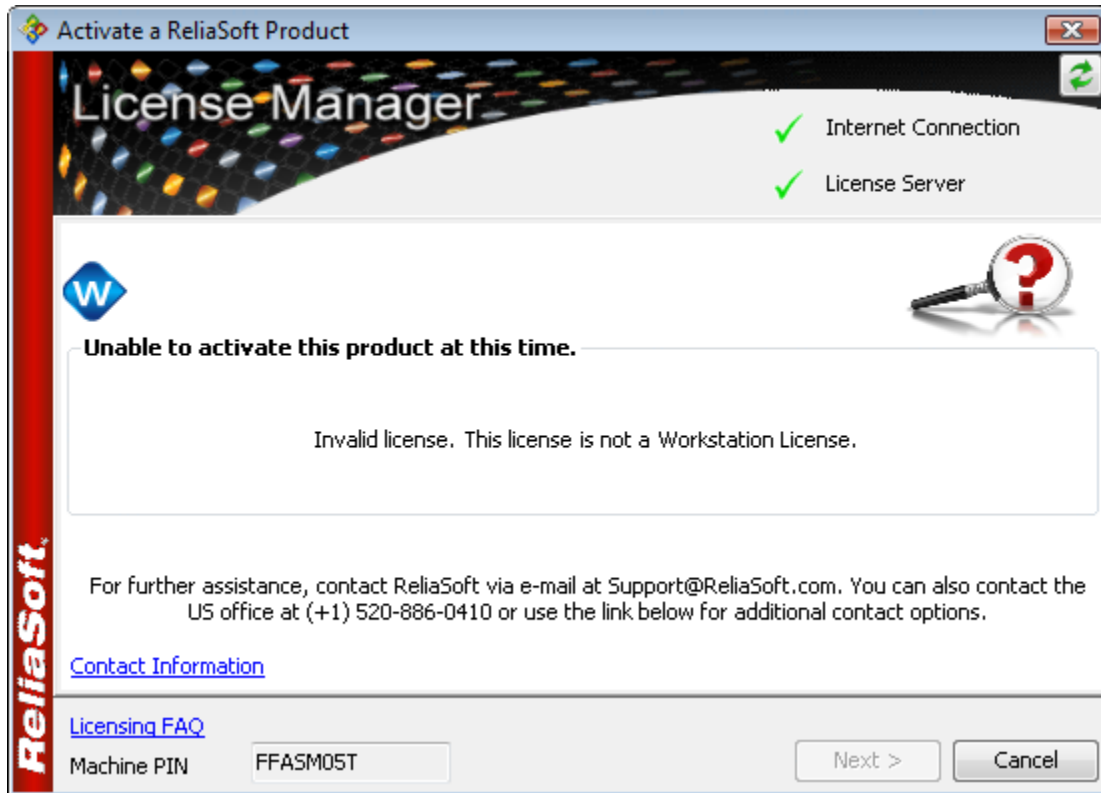**Problem: You receive the following message after entering your Product License Key in the activation wizard:**

Figure 29: License Is Not a Workstation License

Solution:

- The Product License Key you have entered is not a valid multi-user workstation key.
    - If you are trying to activate an application with a Workstation License, confirm that you have entered the correct key.
    - If you are trying to activate an application with a non-Workstation License (e.g., you have deactivated the Workstation License and are now attempting to activate a Single User License), make sure you are <u>not</u> logged in as the RSWorkstation administrator. Accounts with this name can only perform activations with a Workstation License. When you are logged in as a different user, try again to activate.