



Network Edition Download / Installation Instructions

This document includes download/installation instructions for installing PlanGuru v6 on a network server. To facilitate this process, we recommend that you have your network administrator install the software. If you encounter any issues, please submit a Help Desk ticket at <https://planguru.zendesk.com/home> – this will ensure the fastest turn around for you.

The download/installation instructions are included below. **Please review these instructions prior to installing!** In addition, upon completion of the installation, there is a Readme file available in the PlanGuru v6 program folder.

The link to download PlanGuru v6 Network Edition is:
<http://www.planguru.com/ftpupdates/pgv6nwsetup.exe>

Download Password: **Net264Unlock**

You will need the product licensing information included on your invoice in order to activate PlanGuru once it is installed.

The following information will assist with installation:

Import Notes for Current PlanGuru Network Edition customers:

1. Copy the NWConfig.xml file from your PlanGuru v5 program folder into the PlanGuru v6 program folder after PlanGuru v6 has been installed but before running PlanGuru v6. This will avoid issues with the software locating your firm information files.
2. You will either need to add new workstation desktop icons in order to run PlanGuru v6 from the server or update your existing PlanGuru icons to designate a new target application.

PlanGuru v6 Network Installation Instructions

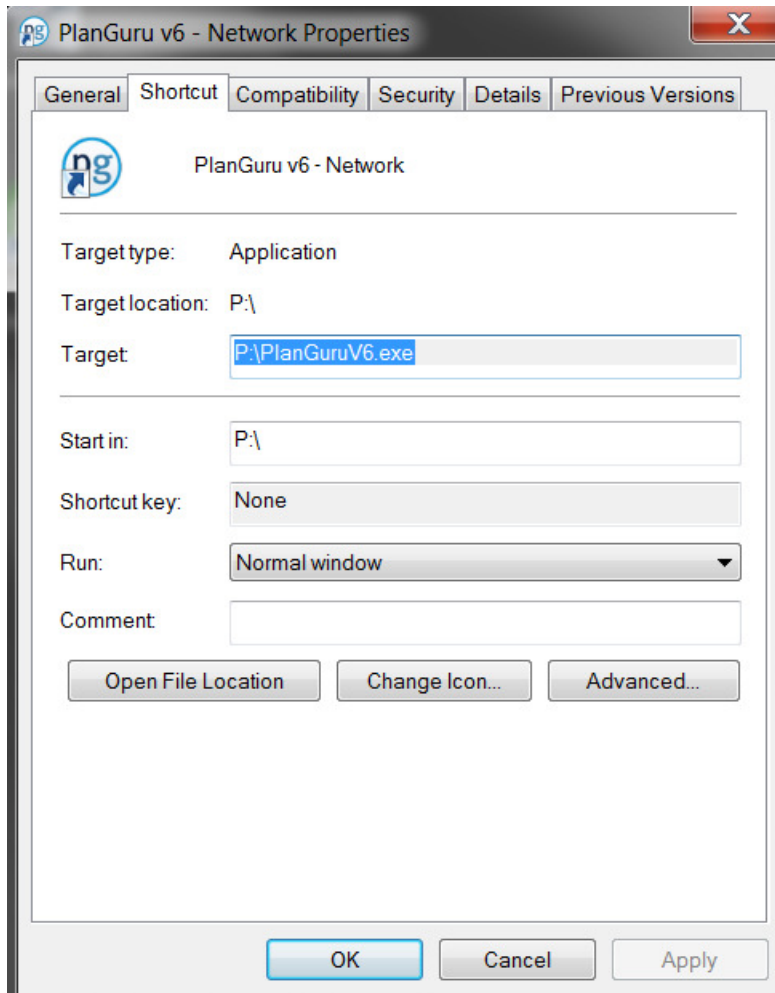
Network Server

1. If possible, the software should be installed at the server (as opposed to installing from a workstation to the server).
2. **You will need administrative privileges to perform the installation.**
3. **PlanGuru must be installed to the server's C drive.** Installing to another drive such as the D drive will create issues when running the application.
4. PlanGuru installs files to 2 locations on your server:

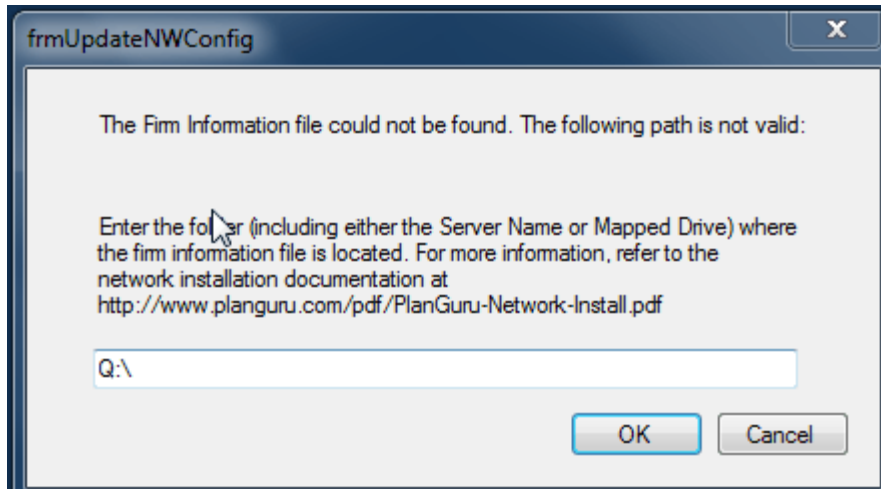
- a. The program and configuration files are installed to \Program Files\PlanGuru LLC\PlanGuru v6
 - b. The firm and company data files are installed to a PlanGuru subfolder in the public documents folder.
 - For Windows XP and Windows 2003, this will be \Documents and Settings\All Users\Documents\PlanGuru\.
 - For Windows 7, Windows 8, Windows 10 and Windows 2008, this will be \Users\Public\Documents\PlanGuru\.
5. Once the software has been installed on the server, you will need to complete the set up as follows:
- a. **Make sure both folders created during installation (see item 3) are Shared with Read/Write permissions.**
 - b. Using Windows Explorer, navigate to the application folder and **make sure a file named NWConfig.xml has been created.** PlanGuru creates this file during installation; however, on occasion the server permissions don't allow the file to be created automatically. If you don't see the file, you can create it manually by executing a file in the same folder named NetConfig.exe.
6. Unless you intend to run PlanGuru v6 on the server, there is no need to execute and license the software on the server. If you want to execute PlanGuru v6 on the server to test the installation, you can activate a network seat on the server and deactivate it when testing is complete. To deactivate a license, start PlanGuru and then select Help|Deactivate License.

Workstations

1. The easiest way to access the software and data from each workstation is to map a network drive to each location in item 3 above. For example, network drive P: can be mapped to the application folder and network drive Q: can be mapped to the shared documents folder. **The network drives you map must be the same on each workstation that wants access to PlanGuru.**
2. Add a shortcut to the desktop of each workstation to provide access to PlanGuru v6 on the server. The target will be the network drive and the file name to execute PlanGuru. For example, if drive P: is mapped to the PlanGuru application folder, the target will be P:\PlanGuruv6.exe



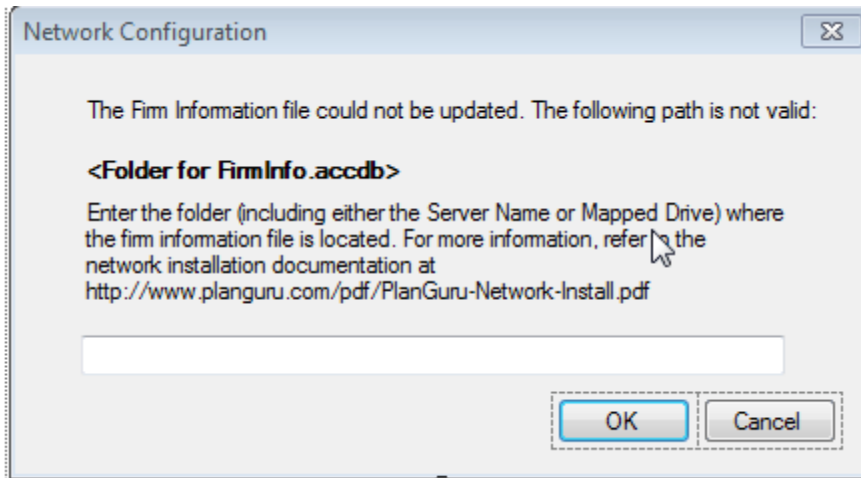
3. The first time you execute PlanGuru from every workstation, you will be asked to license the software. **Each workstation must be licensed using the same license ID and password you received when you purchased the software.**
4. In addition, the first time you run PlanGuru from the first workstation, you will be prompted for the location of the firm information files. Assuming you've mapped a network drive to the PlanGuru shared documents folder, you will enter that drive here. For example, if you mapped drive Q, you will enter Q:\ and press OK to update the network configuration file. This will update the file for all workstations.



5. The final step to completing installation is to update PlanGuru to look for your company files in the correct location. When you run PlanGuru for the first time, you are asked to add a new company or to open an existing company. Exit this window without selecting either option. Select File | Firm Information | Change data file path. Use the Browse button to navigate to the Q drive you set up for the firm data files. Highlight the Q drive and click on OK. Click on File, Open to view a window to select a company and analysis to open. Initially you will only see Sample Company; however, once you add your company and analyses, they will also appear here.

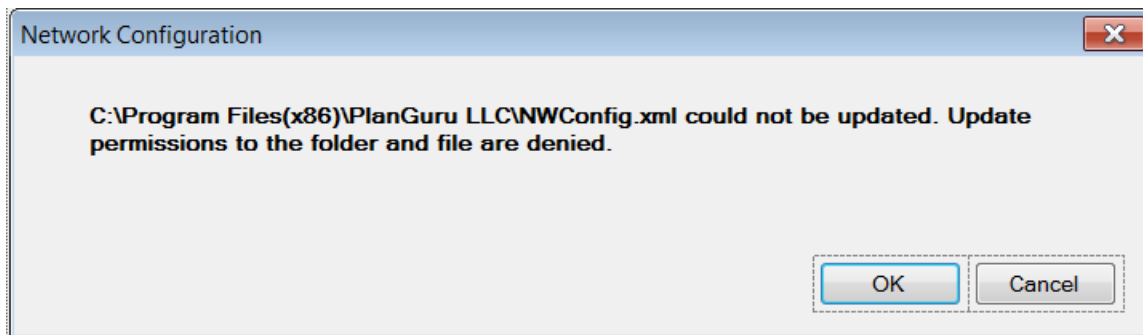
Issues that may arise during or after network installation

1. **PlanGuru Network Edition will not operate properly in evaluation mode.** Evaluation mode is only available as a machine license. If you try to operate PlanGuru on your network in evaluation mode, you will likely receive an error message on the workstations stating that PlanGuru cannot locate your firm information file. You will need to license the software on the workstation with your PlanGuru license ID and password. You can move a license from one workstation to another at any time by deactivating it on one workstation (using the Help menu selection) and then activating it on another workstation.
2. After network installation and licensing, you may receive this message:



This message normally appears when PlanGuru either cannot locate the firm information file from your workstation using the path shown on the screen or can locate the file but can't update it. If the path you see onscreen is not the correct one to allow the workstations access to the PlanGuru firm data files, you can change it in the space provided. If the path is correct, it's likely that the workstation does not have the permissions it needs to read and update the firm information file or the PlanGuru data folder is not shared.

3. If you encounter the screen from step 2 and have entered the new path, you may see the following window:



Make sure the user has the appropriate permissions to read and write to the PlanGuru v6 folder to update NWConfig.xml. If you need additional information about setting and viewing permissions, log a ticket at the PlanGuru Help Desk <https://planguru.zendesk.com/home> to get assistance.