

# Scientific & Educational Software

## Upgrade to Clone Manager Professional 9

Network Edition for Concurrent Use

### Upgrade Instructions

To complete this installation, you will need the upgrade CD and the upgrade license form with the upgrade serial number and license identification numbers. To install the upgrade, please make sure that the program is not currently in use and that full access to the current program directory is enabled.

- Log on as Administrator at the Windows Server 2008 or newer, or Windows Vista or better computer that will be the license server.
- Insert the Clone Manager Professional 9 upgrade CD in CD-ROM drive
- Allow the disk to autorun or run the setup file (Setup.exe) on the CD.
- Follow the instructions on your screen to update the license server components and software program files.

The upgrade program will check your network server, looking for the older version of Clone Manager Professional. If found, the program will be upgraded to Clone Manager Professional 9. You can also use this upgrade CD to re-install the full program, if required. Please contact us for further instructions.

Each authorized user (client) should run the Client9 program found in this directory in order to set up their home directory and install program icons on their local machines (see client instructions below). Additional notes about installation issues can be found on the back of this page.

### Instructions for Program Users (Clients)

Before the Clone Manager program is used for the first time, authorized users need to run a client setup program to assign a home directory and install program icons. Current users will also be directed to run the client setup program to update shortcuts and user documents.

- On your local computer, access the network server directory containing the Clone Manager program files (usually SESuite9).
- Find the **Client9.exe** program and double-click to run.
- Enter your home directory in the space provided. This will be the location where your personal configuration data and directories for your DataBook (database files) and collection files will be stored.
- Use the checkboxes to confirm that menu and desktop shortcuts, file extension associations and the Clone Manager browser compatibility mode can be set.
- Use the checkboxes to confirm that user documentation (pdf files), the program tutorial, and the Clone Manager Help files can be copied to your Home directory.

### Running Clone Manager

After running the Client program, users start Clone Manager by double-clicking on the desktop icon or by clicking Start, Programs, Clone Manager. User documents and the program tutorial can be accessed from the Start, Programs, Clone Manager menu. User documents are pdf files that can be viewed or printed using Adobe Acrobat.

## Group Policy Implementation/Deployment

Microsoft Windows Active Directory can use Group Policy to push configuration of client computers to use the network version of Clone Manager. You use Group Policy Manager to create and enable a Group Policy Object that will cause the client configuration installer to run when the selected computers next start. This configures client computers for file associations and menu shortcuts, copies user documentation (pdf) files and copies compiled HTML help to the local client computer. More detailed instructions, please refer to the document CM\_SetupComp.pdf, found in the AdminTools folder.

*(Group Policy for Computers, Software, Assigned)*

Microsoft Windows Active Directory can use Group Policy to allow administrators to pre-configure user preference settings in the network version of Clone Manager. These settings will take effect when the user next logs in to the network. The administrator has the option to prevent users from changing the preset value. If the settings are not locked, users can change the preset values at any time from within Clone Manager and thereafter their changed value will be used. For detailed instructions, please refer to the document CM\_SetupPrefs.pdf found in the AdminTools folder.

*(Group Policy for Users, Administrative Templates)*

### User Configuration File Editor

Instead of using Group Policy, the network administrator can use the UserConfig program to preset Clone Manager user configuration settings by adding this information to the Clone Manager configuration (.ini) file. Settings include user's home directory, default file format, shared resource location, author and repository information.

You can set the checkbox for each user configuration setting you want to enable. For each setting, select the option or enter the location required. If you do not want individual users' preference settings to override your values, set the Lock checkbox to the right of the item. Detailed information about each configuration setting can be found in the document CM\_UserConfig.pdf found in the AdminTools folder (and also accessible from the program using the Open Help Document button at the lower left).

### Program Tutorials

The program CD contains a tutorial collection for those who are new to Clone Manager. These short tutorials will teach new users about some of the important features of the program. During installation, the Tutorial and a small set of sample files are copied to the subfolder Tutorial in the installation directory.

The Tutorial is a compiled HTML Help file (\*.chm) and should be run locally. When each user runs the Client9 program (see below), they will have the option to copy the Tutorial and sample files to a folder that will be located in their specified home directory on their local computer. An MSI installation file is also provided. If preferred, you can instruct users to run the SetupTutorial.msi installation file to copy tutorial files to [MyDocs]\CloneManagerTutorial and create a shortcut to the folder.

### Security Center Firewalls

The presence of a Security Center Firewall on the License Server for the Clone Manager software can create a condition where users are unable to start the Clone Manager program. The firewall, by default, blocks TCP/IP servers from accepting client connections. To resolve this problem, you can set an exception for the Clone Manager license service. In Control Panel, select Security Center, Windows Firewall, then select the Exceptions tab. Click the Add Program button and enter the location of the license service program (usually C:\Program Files\SciEdLicense\SciEdLicense.exe). In Server 2008, you may need to create an Inbound Rule to allow the license service to accept connections.