



Smartware Studio™ Designer Module (aka Design360)

Upgrading from Designer Suite 2005

*Version 3.2
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1. Before You Upgrade

This document is designed for offices who currently use *Designer Suite 2005* to help them upgrade to the new *Smartware Studio* platform (also known as *Studio360*), which includes the *Designer Module* (also known as *Design360*).

What Happened to *Designer Suite*?

Designer Suite 2005, which as its name implies has been around for some time, has received a major overhaul. As you know, its functionality was divided into two areas:

- The *Project Explorer*
- The Designer Suite *Visio Stencils*

The *Project Explorer* was the environment for storing and managing the files in a project and running the project-level tools, such as the Print Manager, Page Wizard and Reporting Engine. The *Visio Stencils* contained the shapes representing various parts, such as controllers and sensors, as well as other shapes such as the Title Block and Bill of Materials.

The functionality of the Project Explorer has now been replaced by our more powerful environment, *Smartware Studio* (aka *Studio360*). All of the features of Designer Suite 2005 have been retained, and in many cases, greatly enhanced. Many of the Visio Stencils and shapes have also been updated, though the general procedure for working with Visio drawings remains the same.

What is *Smartware Studio* (aka *Studio360*)?

Smartware Studio is a software platform for creating and managing a wide range of documents and information about engineering control projects. It consists of several fully-integrated modules, including:

The *Core Module*

- Advanced File Storage
- E-Mail Storage
- Automatic online/offline synchronization of files
- Automatic retention of multiple versions of each file
- Network Tree modeling and software file storage
- Password storage
- Part Database and PDF Data Sheet browsing
- Standard System Library

The *Designer Module* (also known as *Design360*)

- Creating of Engineering Submittals using Microsoft Visio
- Controller Library shapes
- Reporting and Checkout Sheets
- Gathering of PDF Reports

The *Estimating Module*

- Creating of Estimates and Reports

What are *Studio360* and *Design360*?

Studio360 is the Schneider Electric branded edition of Smartware Studio. The installation process and many display elements are customized to best suit the Schneider Electric branches and partners. Both editions contain all of the same features and functionality, so anywhere in the documentation or programs where you may see references to Smartware Studio, you can be sure it applies equally to *Studio360*.

Likewise, the Designer Module is also referred to as *Design360*.

Do We Have to Upgrade?

We are phasing out the stand-alone Designer Suite 2005 application, and will likely not publish any further updates other than to the Parts Database.

However, there is no specific timeline or cutoff date for upgrading. We encourage all companies who use Designer Suite 2005 to plan their upgrade on their own schedule. We hope most users will be excited about the new capabilities and be eager to update, but recognize that others may want to upgrade their server capabilities or plan around existing deadlines and workloads.

What Will We Need to Upgrade?

For each existing workstation running Designer Suite 2005, you will need a license for the Smartware Studio Core Module plus a license for the Designer Module.

- If you are not already using Smartware Studio, you will need to purchase the Core Module licenses from Smartware Technologies.
- Your license for Designer Suite 2005 will be upgraded to a license for the Designer Module at no additional cost.

So, if you have five engineers using Designer Suite 2005, you will need to purchase five Core Module licenses, which will be upgraded automatically to include the Designer Module.

Does Smartware Studio Require a Server?

Where Designer Suite 2005 was mostly a workstation application (though you could store files on a network drive), Smartware Studio is inherently a client-server system. The detailed requirements can be found in the *Setup and Administration Guide*, but in short there are two elements to the server configuration:

- A shared folder on a file server where Smartware Studio stores all your project files and Visio drawings
- A Microsoft SQL Server database for project headers, indexes and the Parts Database. You can use the free Microsoft SQL Server Express edition.

The Smartware Studio application doesn't need to run on the server itself, though it can be used to configure the folder and database.

Can I Still Run Designer Suite 2005?

You can continue to run Designer Suite 2005 on the same machine as Smartware Studio. This will make it easier to migrate your projects one at a time and at your own pace.

However, please be aware that:

- Smartware Studio stores its files in its own file structure. You will need to import your existing projects into Smartware Studio. There is a detailed discussion of the various ways to import and store your projects later in this document.
- The import is a one-way process. Once a drawing file has been opened through Smartware Studio, it will not open properly in Designer Suite 2005. There are also newer versions of many stencils and shapes, which require Smartware Studio to run.
- If multiple engineers are working on a project that is imported into Smartware Studio, they will all need Smartware Studio installed to work with the project.

What's New in this Version?

Compared to the Designer Suite 2005 Project Explorer, the Smartware Studio Core Module represents a giant leap forward in file and information storage. There are also many upgrades in the Designer features that have been brought over from Designer Suite 2005.

While you will want to review the other Guides for full details, a few highlights include:

- Automatic online/offline synchronization of files
 - Automatic retention of multiple versions of each file
 - Network Tree modeling and software file storage
 - E-Mail and Password Storage
 - Windows 7 Compatibility
-
- Automation Overview Generator
 - Permission Model for restricting access to projects and files
 - New Parts Database Manager
 - New Multi-File Standard System Library
 - Visio 2010 Compatibility
 - Enterprise Management tools for distributing Parts Database and Custom Templates, Reports and Stencils.

2. Installing and Licensing Smartware Studio

This section will walk through the various checklist items that you will want to review to ensure that all of the configurations and customizations that you have in Designer Suite 2005 are available to you in Smartware Studio.

Installing Smartware Studio

Before anyone in an office can begin to use the system, the *IT/Network Administrator* will need to install and configure the database and file server.

- The *Setup and Administration Guide* provides a complete, detailed walkthrough of the various steps required.
- Once the server has been configured, workstations can be installed and licensed by individual users without them having direct access to the server. The licensing process points each workstation to your server automatically.

User Accounts

Each user of Smartware Studio needs to have a *User Account*. These can be created and maintained by one or more people in your company designated as an *Office Administrator*.

- The User Accounts, passwords and licenses used by *Designer Suite 2005* are stored in a separate database from those used by *Smartware Studio*, and cannot be automatically transferred. You will therefore need to create new User Accounts in Smartware Studio.
- If you have a significant number of users, we can import the list from a spreadsheet. Please contact our Technical Support team for more information.

You will want to designate at least one person in your office (and possibly several) to be an *Office Administrator*. When using the software, this person has access to additional administrative tasks (through the ADMIN menu and described in the later chapters of the *Setup and Administration Guide*) such as:

- User Account Management
- License Account Management
- Parts Database Management
- Permissions Management
- Designer Template Management
- Standard Library Management

License Accounts

As with Designer Suite 2005, each workstation needs to be licensed individually. Each machine registers itself to one of the Smartware Studio License Accounts that have been purchased by your office.

- Each Smartware Studio License Account will include the Core Module, and can optionally include the Designer Module and/or Estimating Module.
- To use the full set of Designer Module features, a license must include the Designer Module
- A workstation licensed for just the Core Module will still be able to open and work with Designer projects. Users on that machine can read, edit and create files and folders in the project and can also run reports. They cannot, however, edit Designer Visio drawings with the full capabilities of the Designer Smart Shapes unless the machine is licensed for Designer.
- Existing licenses for *Designer Suite 2005* need to be transferred to an existing Studio license to enable the Designer Module features. Our technical support team can take care of this for you.
- An administrator has the ability to see what licenses are in use and available from the ADMIN→USER AND LICENSE MANAGEMENT menu command.

The Parts Database

After you have installed and configured Smartware Studio on your server, you will want to go into the Parts Database Manager and do an initial Synchronize to Smartware:

- From the ADMIN menu, select PARTS DATABASE MANAGEMENT...
- In the Parts Database Manager, select FILE→SYNCH TO SMARTWARE MASTER DATABASE and follow the instructions there.

The Parts Database Manager of Smartware Studio is a huge leap forward from the features available in Designer Suite 2005.

- The master Parts Database for your company is now stored with your project data in a SQL Server database.
- There is a new Parts Database Manager tool available to users who have been given permission to access it by an Office Administrator (using the User and License Management tool)
- You will need to reset the custom Discount Multipliers for your company in the new Parts Database Manager.
- Parts Database Managers are notified about price updates and other changes to the 20,000+ parts managed by Smartware. Updating is handled with a single button-click.
- Updates to the Parts Database are automatically distributed to all users through the server when the Parts Database Administrator publishes it.
- If you have custom parts that were added to your Designer Suite 2005 Parts Database, you will need to import these into the new Parts Database Manager. Refer to the section later in this document.
- Part Information PDF Files are managed through Studio. Copies are downloaded to your office server by the Parts Database Administrator and automatically distributed to each workstation.
- Refer to the *Setup and Administration Guide* for more information on setting up and managing the Parts Database.

Documentation

All of our documentation is provided in printer-friendly PDF formats directly from the HELP menu. You can also find them on our web site (no login required).

- The *User's Guide* will provide a solid foundation of the Core Module and its Project and File storage features.
- For Applications Engineers who will use the *Designer* module, the upcoming *Designer Module User's Guide* will be the best reference. Until it is available, this document and the existing *Designer Suite 2005 User's Guide* can act as a substitute.

3. Working with Projects and Files

Like Designer Suite 2005, Smartware Studio allows you to organize your files into collections of folders called Projects. There are actually several types of Projects in Smartware Studio:

- Customer Site Projects
- Job Projects
- Designer Projects
- Estimate Projects

There are several different ways to organize your projects depending on your preferences. Refer to the *User's Guide* for complete information. One recommended approach is:

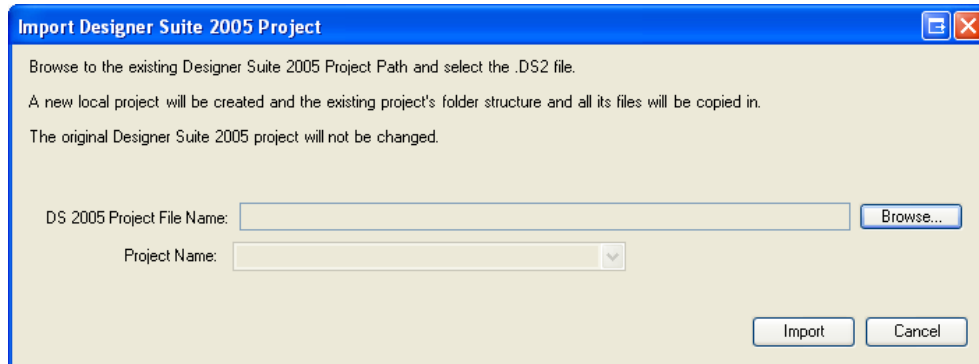
- Create a separate *Designer Project* for each existing Designer Suite 2005 project and for each new Engineering job. These projects should contain the Visio drawings, schedules and other associated documentation related to the engineering and submittal.
- Create a *Customer Site Project* for each customer site. This project can contain shortcuts to the various Designer projects you have created to help organize them together. The Customer Site project is the best place to build the Network Tree for the customer, since it is centralized and will avoid duplicating the Network Tree in multiple Designer projects.
- You may want to create a *Job Project* for the other information related to the accounting-level job, such as Sales, Installation and Warranty. This makes it easier to create a permissions model to control which employees have access to which information. You can put shortcuts to the Job Projects in the Customer Site project as well.

Importing an Existing Designer Suite 2005 Project

You will likely want to bring your existing Designer Suite 2005 projects into Smartware Studio. This is done by importing them, which will create a new Smartware Studio Designer project and copy in the folder structure, files and properties from the existing project. The original Designer Suite 2005 project and its files are left unchanged.

To import a Designer Suite 2005 project as a new Designer project:

- From the FILE menu, select NEW PROJECT. This will bring up the Open Project screen.
- If your Local Projects are not shown, click the SHOW LOCAL PROJECTS button in the upper-right corner.
- Under the Local Project list, click the IMPORT DS 2005 PROJECT button.



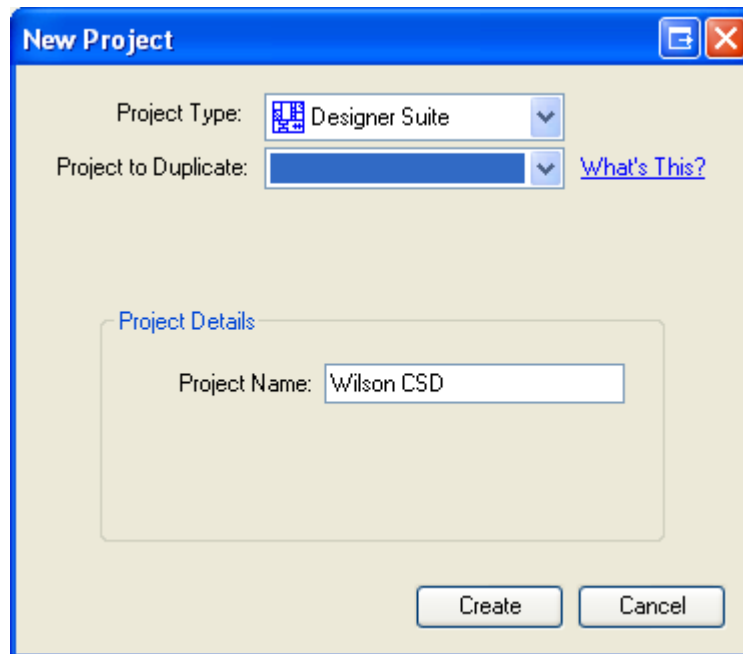
- Browse to the location of your existing Designer Suite project and select the .DS2 file.
- You will be given a choice for the new Project Name, depending on the name of the .DS2 file, the name of the folder and the name of the Project in the Project Properties. You can also specify a different name.
- Click IMPORT. The project and all the files will be imported.
- Once created, you will likely want to upload the project to the server so other users can view it as well. Refer to the User's Guide for more detail.

Creating a New Designer Project

New Designer projects are created the same as other Smartware Studio projects:

- From the FILE menu, select NEW PROJECT. This will bring up the Open Project screen.
- If your Local Projects are not shown, click the SHOW LOCAL PROJECTS button in the upper-right corner.

- Under the Local Project list, click the NEW PROJECT button.



- Select the Designer project type and specify the Project Name. Click CREATE to create the new project.
- The new project will only contain a *Systems* folder and a *Schedules* folder. To create different default folder structures for new projects (as with the Designer Suite 2005 *Project Profiles*), refer to the later section on New Project Templates.

Working with a Designer Project in Smartware Studio

Once you've created or imported the Project, you should find working with the project to be similar to Designer Suite 2005. The *User's Guide* provides complete details on how to work with projects, folders and files, but a few key items to note include:

Checking Out Projects

Once you have uploaded the project to the server, you will need to *check it out* in order to make changes to the folder structure. You do not, however, need to check it out in order to add or edit files in the project. Refer to the *User's Guide* for more information on this important concept.

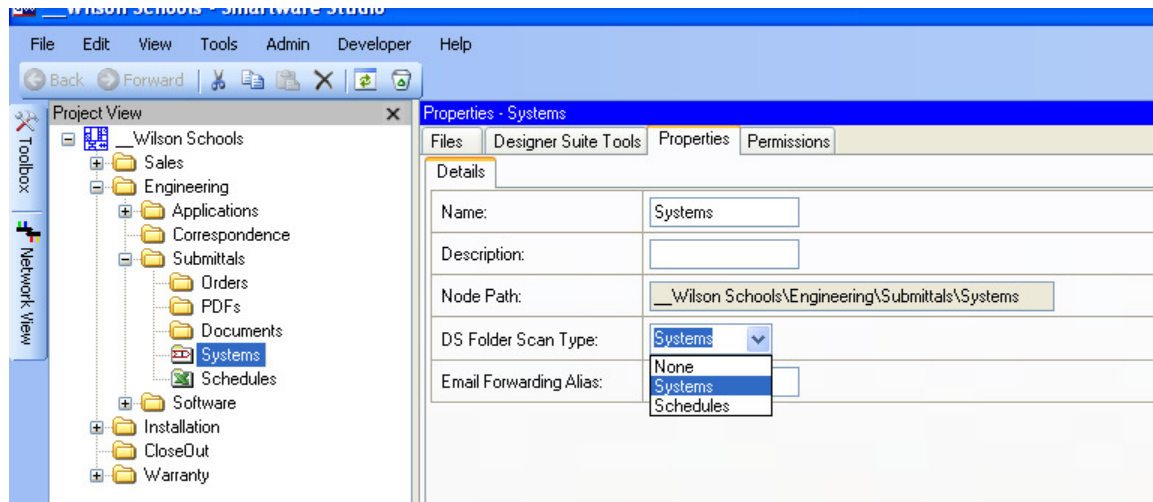
Folder Types and Codes

The two-digit code that prefixed the folder names in Designer Suite 2005 are no longer used. They had served two purposes:

- Keeping the folders in a specific order (separate from their alphabetical order)
- Identifying folders that contained System Drawings and Schedules

Both of these scenarios have been otherwise resolved:

- In Smartware Studio the folders will retain their relative positions and order automatically. You can drag and drop a folder around to move it above or below another folder.
- Systems and Schedules folders are identified by selecting the folder and going to the Properties tab. There you can select the *DS Folder Scan Type*:



Creating a New Drawing File or Schedule

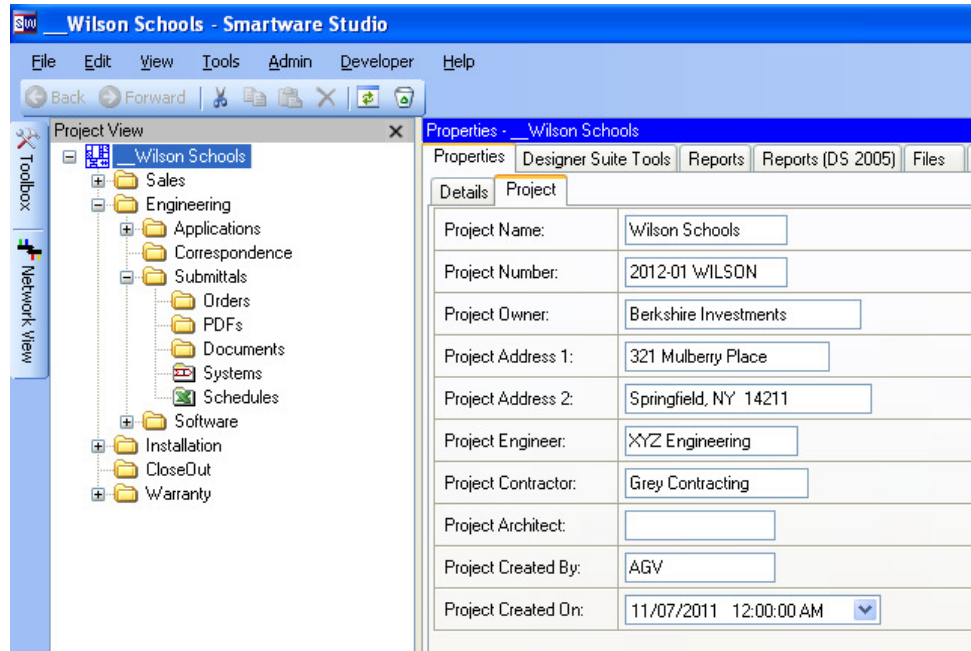
You can add a new file to your project by either:

- Right-clicking in the white area of the Files list and select the type of file from the NEW menu.
- Right-clicking on the folder to which you want to add the file and select the type of file from the NEW menu.

As with Designer Suite 2005, these new files are copied from Template versions, which you can specify in the TOOLS→OPTIONS dialog (on the Designer Suite tab). Refer to the later section on Template Files for more details on the expanded capabilities of these files.

Editing Project Properties

The Project Properties, which are used in various shapes and reports such as Title Blocks and Tables of Contents, can now be found by selecting the root of the Designer project in the Project View and going to the *Properties* tab. There is a separate sub-tab for the *Project Properties*:



The Standard System Library

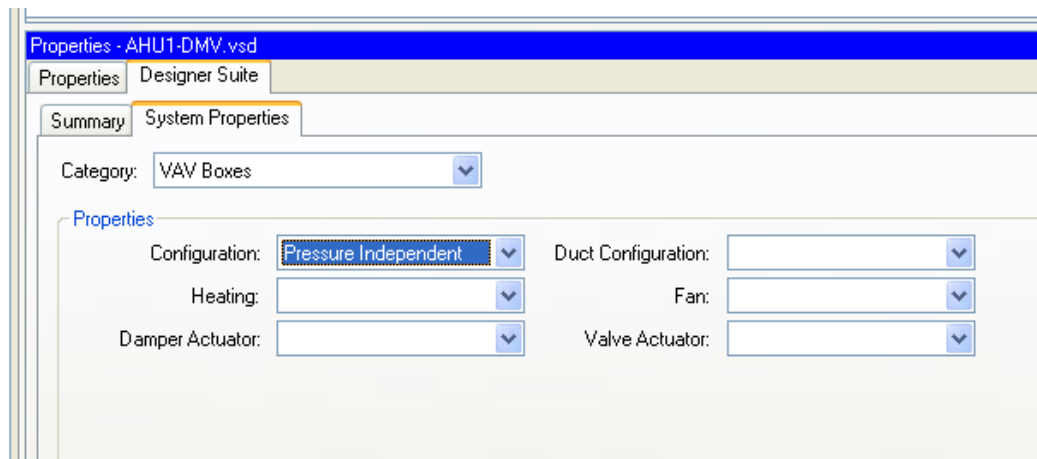
The Standard System Library from Designer Suite 2005 is still available, although now it is referred to as the *Single-File Library*. This library works with individual Visio Drawing files that are tagged with additional properties that can be used for searching. There is also a new version, the *Multi-File System Library*, which adds additional features.

The Single-File System Library

If you have an existing Standard System Library, you can easily bring it over into Smartware Studio.

- The System Library is no longer a shared folder that all users can point to. Instead, each user has a copy of all the library files. Select **TOOLS**→**OPTIONS** and go to the *System Library* tab to open this local folder.

- There is a different folder on the server where you can put System Library files for everyone to share. Each time a user starts Smartware Studio, any new files in this folder are automatically copied to their local folder. To access this folder, select ADMIN→DESIGNER MODULE MANAGEMENT and go to the *System Library* tab.
- To insert a file from the System Library, right click on a folder or in the file list and select NEW→INSERT DRAWING FROM SINGLE-FILE LIBRARY. The familiar *Select a System from the Library* dialog will appear.
- To specify the search properties for a Visio drawing file that you want to put in the library, right-click on the file in the file list and select PROPERTIES. The Properties window will open in the lower part of the files pane. Select the Designer Suite tab and the *System Properties* sub-tab:



- To copy a drawing file into your local version of the System Library, right-click the file and select SEND TO SINGLE-FILE LIBRARY. The drawing will be copied to your local System Library. If you want to add this file to the server version so all users download it, you will need to copy it explicitly into the Server version of the System Library folder.

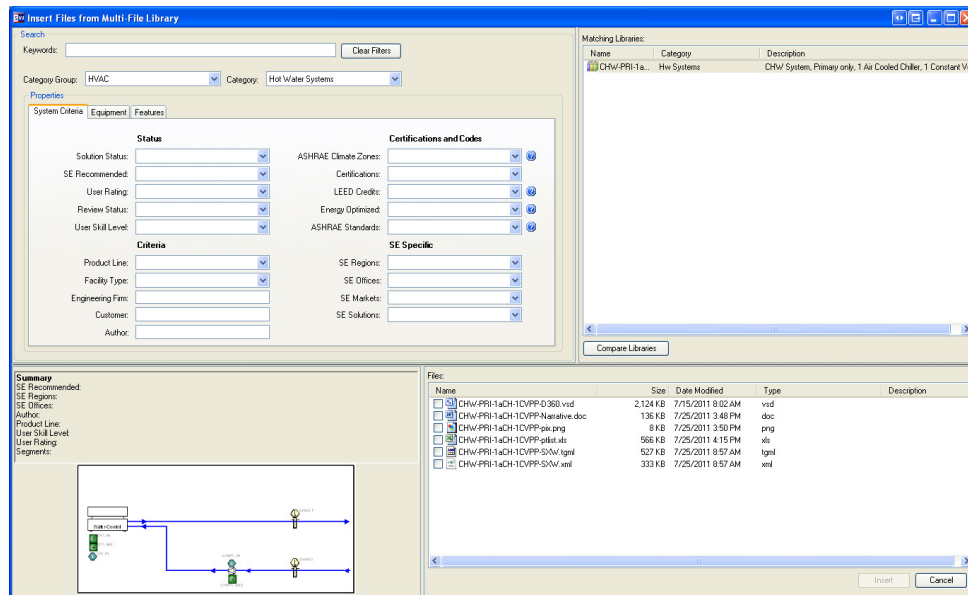
The Multi-File System Library

There is a new version of the System Library in Smartware Studio. Similar in concept, the key differences are:

- The libraries are zip files and contain as many different files of any type you like.
- The properties available for searching are more extensive.
- When you search for and select a library, you can insert multiple files at once.

Multi-File libraries are stored locally and on the server in the same folders as the Single-File Library files, as described above. Additionally:

- You can create Multi-File System Libraries by selecting Tools→Libraries→Manage System Libraries.
- To insert a file from the Multi-File System Library, right click on a folder or in the file list and select NEW→INSERT FILES FROM MULTI-FILE LIBRARY.



Project Profiles

In Designer Suite 2005 you could create one or more *Project Profiles* which contained the folder structure to use when creating new projects. There was also a *Profile Editor* for building and editing these structures.

In Smartware Studio, this process is somewhat simplified by allowing you to designate any existing server project as a New Project Template. When you create a new project, you will be offered a list of all the New Project Templates of that project type, and if you choose one, it will be duplicated to become your new project.

New Project Templates are managed in the Open Project screen.

- To mark an existing server project as a New Project Template, right-click on the project name and select ADMIN→MAKE PROJECT A NEW PROJECT TEMPLATE.
- If Permissions are enabled, you must have the *Set Project Group and Templates* project permission.

- An administrator can check the new ONLY SHOW 'NEW PROJECT' TEMPLATE checkbox to filter the Server Project List to just the template projects.

When creating a New Project, you will be prompted with a PROJECT TO DUPLICATE list of the template projects of the selected project type. If you choose one of these templates, it will be duplicated to create the new project.

- Any files stored in the New Project Template project will be duplicated as well.

Importing Existing Designer Suite 2005 Project Profiles

If you have existing Designer Suite 2005 Project Profiles that you want to use in Smartware Studio, do the following to import them:

- In Designer Suite 2005, create a new project using the Profile.
- In Smartware Studio, import that project as described earlier.
- Add the Smartware Studio project to your server.
- Right-click on the project in the Server List and select ADMIN→MAKE PROJECT A NEW PROJECT TEMPLATE

Working With Designer Visio Drawings

In general, you work with Designer Visio drawings stored in Smartware Studio in the same way as you did in Designer Suite 2005. Simply double-click the file in the file list to launch it in Visio with the Designer menu and functionality enabled.

A few differences and improvements to note:

- The DS 2005 TOOLS menu added to Visio has been renamed DESIGN TOOLS.
- You can now open multiple Smartware Studio projects at one time
- You can now open multiple Designer drawing files in Visio at the same time
- There is a new Obsolete Parts error check available from the Design Tools menu in Visio.

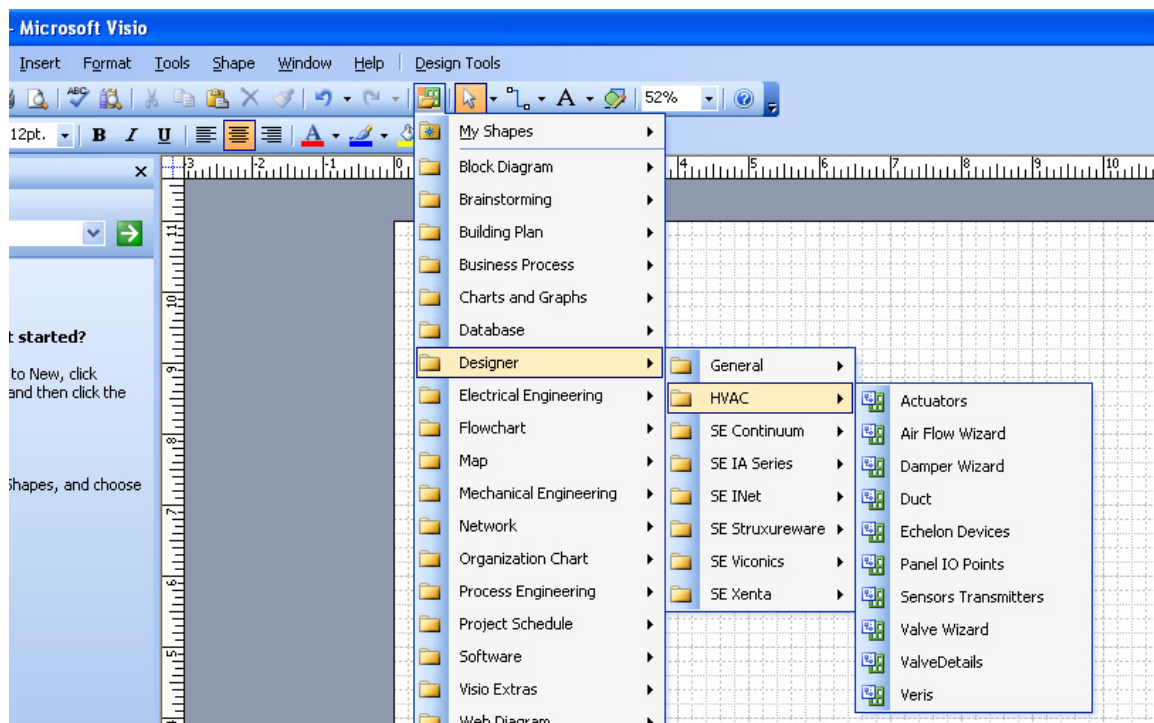
Changes to specific stencil shapes include:

- There are new stencils for most of the Schneider Electric controller lines, including StruxureWare, Continuum, Xenta and I/Net.
- The *Bill of Material* Shape in the *Page Add Ins* stencil now allows you to optionally show the Manufacturer or Vendor Part Number (along with the Database Part Number)

- The Relay shapes (Separable Relay and Pt-To-Pt Relay) have been upgraded with new filter selection properties and updated part and terminal wiring data in the Parts Database.
- The general purpose *Sensor* shape in the *Sensors & Transmitters* stencil has been significantly updated to allow for more customization and flexibility.

Visio Stencil Files

In Designer Suite 2005, the Visio stencil files would appear as a fairly long list in the root of the Shapes menu. In Smartware Studio, these stencils have been organized into folders, starting with DESIGNER:

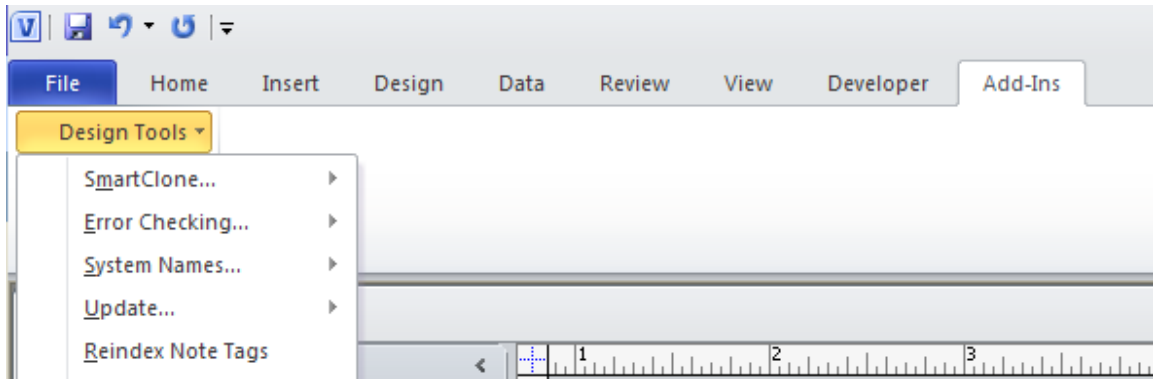


- If you have custom Visio Stencils that you use in Designer Suite 2005, refer to the later chapter on customizations for important changes in where they should be stored.

Using Visio 2010

You can now use Visio 2010, as well as Visio 2003 and Visio 2007. You can also use multiple versions of Visio on a machine if other applications require them. As it is with Windows, Smartware Studio will open the Visio drawings using the last version of Visio that was launched.

In Visio 2010, the DESIGN TOOLS menu will be located on the ADD-INS tab of the new Ribbon menu:



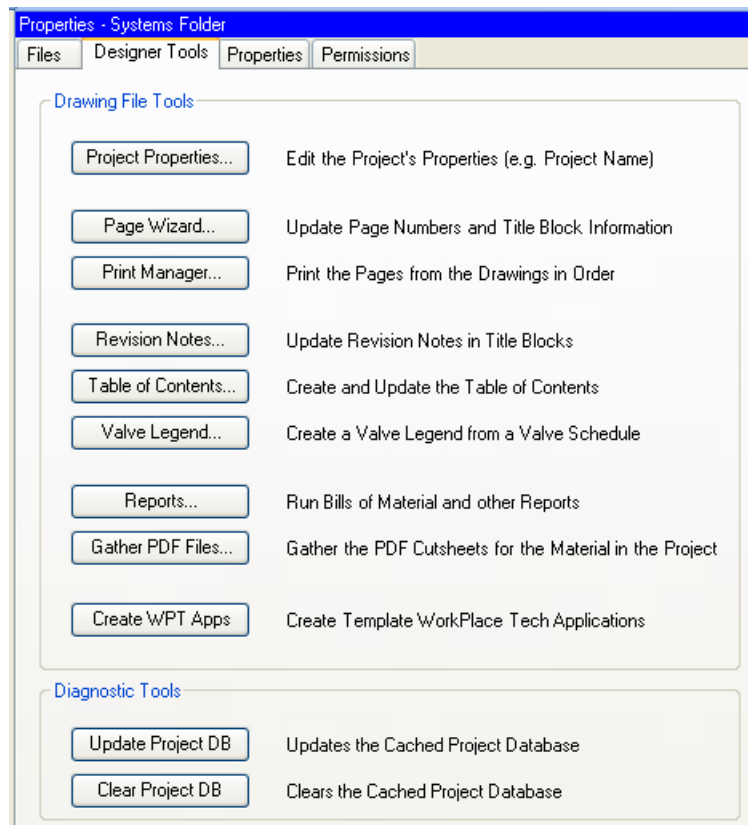
4. Using the Designer Module Tools

Much of the power in Designer Suite 2005 is accessed through the Project Explorer's Tools menu. Most of these tools have been brought into Smartware Studio and organized similarly, with new and more powerful features.

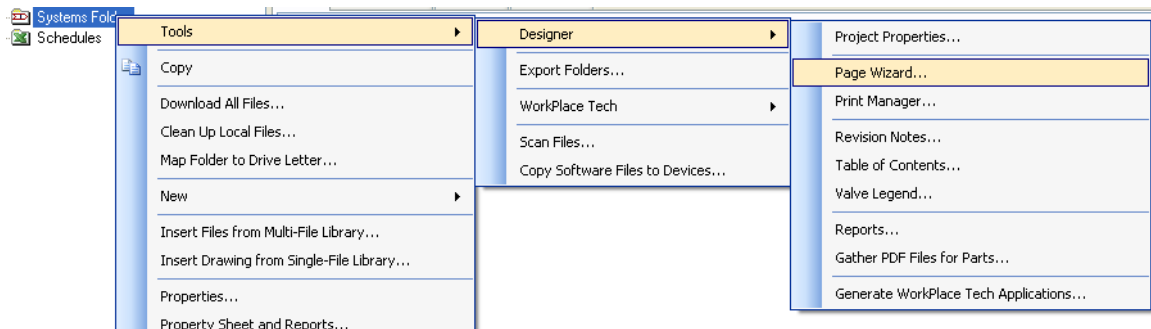
Accessing the Designer Tools

You can access the tools in two ways:

- When you select the Designer project node, a Systems folder or a Schedules folder, you will see a Designer Tools tab:



- You can also right-click on any folder in the Project View and select the **TOOLS→DESIGNER** menu.



Scanning Drawing Files

As in Designer Suite 2005, many of these Tools require that all the drawings and schedules in the project have been scanned to collect their information into a local database (the *Project Database*).

- This database file is not imported from a Designer Suite 2005 project, so all the files will be rescanned the first time you use one of the tools on an imported project.
- The Project Database is not stored on the server, so all the files will be rescanned on each workstation on which the project is opened and a Designer tool is used.

Changes to the Designer Tools

The following section details any differences in the Designer Tools from their Designer Suite 2005 versions.

Browse Parts

The Parts and PDF browsers reflect changes to the Parts Database itself. Refer to the later section on the Parts Database. In addition:

- You can view multiple types of PDFs, where available.
- Parts can be browsed by category.
- You can also right-click a part to view all the details of the part.
- You can view the manufacturer's web site.

Site Manager

The Site Manager tool has been phased out, and will soon be replaced by a more powerful System Tree as part of the Designer project.

Page Wizard

There are no significant changes in the Page Wizard.

Print Manager

The Print Manager includes a new *Print Order* option: *By Folder, then Page Number*. This is useful in scenarios where there are several separately numbered submittals stored in a single project that need to be printed at one time.

Revision Notes

The Revision Notes includes an extra option that allows you to leave the Revision Notes alone while still removing the Revision Bubble shapes.

Table of Contents

There are a few changes to how you work with the Table of Contents files:

- When creating a Valve Legend in Designer Suite 2005, you are prompted for the name of the folder in which to save the Table of Contents' Visio drawing file.
- In Smartware Studio, you create the Table of Contents in the same manner as you create a new drawing: right-click on a Systems Folder (or in the empty area of the file list of a Systems Folder) and select NEW→TABLE OF CONTENTS.
- If you are trying to open an existing Table of Contents from an imported Designer Suite 2005 project, it may not be immediately recognized as a Table of Contents file (in the file list, the Type may say *Designer Drawing* instead of *Designer Table of Contents*). If this occurs, right-click on the file in the file list and select MARK AS TABLE OF CONTENTS.
- You still open a Table of Contents file by double-clicking it in the file list. However, in Smartware Studio you will be given a new option of opening it in Visio without the Table of Contents editor window. This is a quicker option if you just want to view the document.

There are also changes to how the template file for the Table of Contents is stored, selected and distributed. Refer to the next chapter for more details.

Valve Schedule

In Designer Suite 2005, there was a command in the TOOLS menu to open up the Valve Scheduler editor with the option to create or open a schedule file. This option is not available in Smartware Studio. You should use the alternate method (also available in Designer Suite 2005):

- To *create* a schedule, right-click on a Schedules Folder (or in the empty area of the file list of a Schedules Folder) and select NEW→VALVE SCHEDULE.
- To *edit* a schedule, double-click the schedule in the file list.

There are also changes to how the template files for the Valve (and other) Schedules are stored, selected and distributed. Refer to the next chapter for more details.

Valve Legend

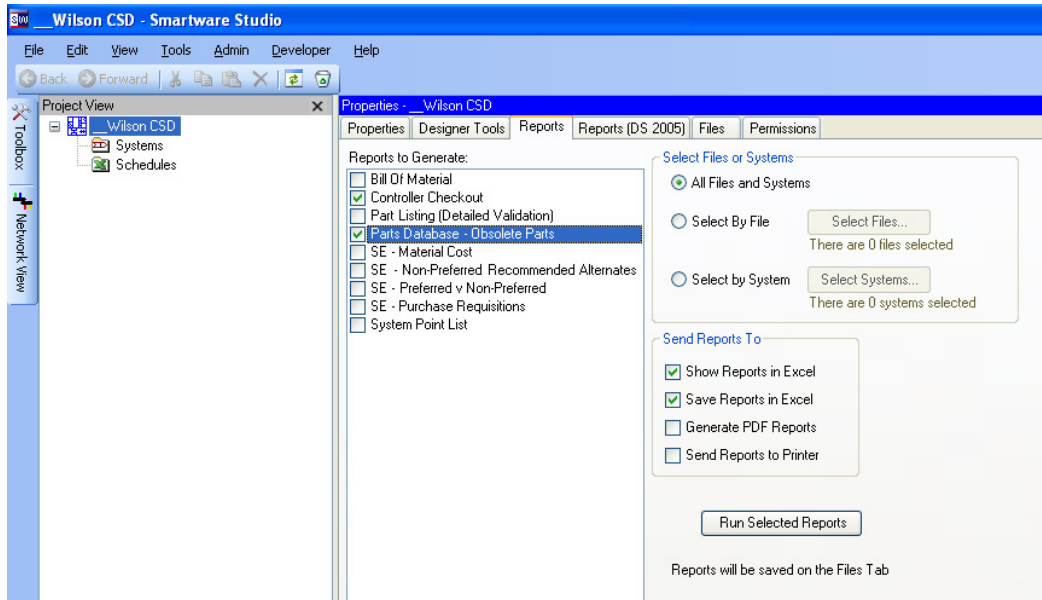
When creating a Valve Legend in Designer Suite 2005, you are prompted for the name of the folder in which to save the generated Visio drawing file.

In Smartware Studio, it will automatically be saved as *Valve Legend.vsd* in the currently selected folder in the Project View.

There are also changes to how the template file for the Valve Legend is stored, selected and distributed. Refer to the next chapter for more details.

Reporting Engine

In Designer Suite 2005, the Reporting Engine was accessed through the TOOLS menu. In Smartware Studio, you create reports from the Reports tabs available when the root of the Designer project is selected in the Project View tree:



- There are two tabs for reports: the *Reports* tab, which is the location for fully migrated reports, and *Reports (DS 2005)*, which contains the full list of Designer Suite 2005 reports for backward compatibility.

The New Reports

The Reporting Engine has been upgraded in Smartware Studio.

- The format for the report templates has been upgraded as well, so existing reports need to be updated. The key Designer reports have been upgraded and enhanced.
- The new *Reports* tab allows you to generate multiple reports into a single Excel Workbook. Simply check all the reports you want to run at once.
- The new *Reports* tab can create a PDF from the generated Excel Workbook. Some additional configuration is required on each workstation. Go to TOOLS→OPTIONS and select the *PDF Generator* tab, and refer to the Setup and Administration Guide for full details.
- The generated report files are automatically saved on the *Files* tab of the root Designer node in the Project View tree.
- Pricing and Description information about all parts is automatically updated from the Parts Database whenever you run a report.
- If you have custom reports, refer to the next Chapter for more detail on upgrading, storing and distributing your custom reports.

New Reports include:

- An updated *Bill of Material* report
- A new *Part Listing (Detailed Validation)* report that shows all the parts in a project along with validations, such as being in the database, Obsolete Date, Alternate/Replacement Part Number, Manufacturer and Vendor Part Number. (This replaces the Designer Suite 2005 *Parts Found* report).
- A new *Parts Database – Obsolete Parts* reports that shows all parts in the Parts Database that have been obsoleted, along with an Alternate Part Number if available.

The DS 2005 Reports

For backward compatibility and migration, the existing Report Engine functionality and reports are still available, but on a separate tab labeled *Reports (DS 2005)*.

- If you have custom Designer Suite 2005 reports, you can put them into the *Designer Suite* reports folder (see next chapter) to use them unchanged. You can also upgrade them to work in the new *Design* report folder.
- It is likely that this tab will eventually be phased out of Smartware Studio.

Update Prices for Parts in Project

In Designer Suite 2005 there was a command on the Tools menu that updated the price information in your Designer Suite Project Database to match the latest version of the Parts Database. This now happens automatically whenever a report is run, so this command has been removed.

PDF File Reports

There are no significant changes in this tool.

Generate WorkPlace Tech Applications

There are no significant changes in this tool.

Database Manager

The Designer Suite 2005 methodology of updating the Parts Database has been removed and replaced with a far more advanced Parts Database Manager (available from the Admin→Parts Database Manager menu command, if you have permission). Refer to the next chapter and the *Setup and Administration Guide* for more details.

5. Customizing Smartware Studio for Designer

There are a number of features of Designer Suite 2005 that allow you to customize and enhance the built-in elements. These customizations will need to be copied from your existing Designer Suite 2005 installation and reapplied in Smartware Studio.

There are also a number of new features in Smartware Studio that make it much easier to distribute your customizations to all the users in your organization.

Storing and Distributing Customized Files

In most cases, the custom files you create (reports, templates, parts databases) are handled the same way:

Local Files

A copy of the custom data is stored on each workstation

For Windows XP, the main folder is usually:

C:\Documents and Settings\All Users\Application Data\Smartware Studio

For Windows 7, the main folder is usually:

C:\ProgramData\Smartware Studio

In both cases, these folders are normally hidden by Windows, so you may need to tell Windows Explorer to show hidden files and folders in order to view it.

There are various sub-folders in this folder that store the different types of files:

<i>\Custom Templates</i>	Custom versions of the Designer templates (e.g., Blank Drawing, Valve Schedule, etc.)
<i>\Reports\Design</i>	Reports for the new version of the Report Engine
<i>\Reports\Designer Suite</i>	Reports for the older DS 2005 Reports tab
<i>\System Libraries</i>	Single-File and Multi-File Libraries

As described in the next sections, you can put your custom files into these folders on your workstation to make them available to your workstation (but not other users).

Server Files

Smartware Studio stores all its server files (project data, configuration data and custom files) in a single folder structure on your server that was set up by your administrator. You can determine the location of this folder on your network by selecting **TOOLS**→**OPTIONS** and reviewing the *Server Settings* tab.

In your server folder is a sub-folder called *Resources*. This folder contains other sub-folders where *distributable versions* of your custom files can be stored. Any time a user starts Smartware Studio, their workstation looks to these folders and copies any new or updated files into the appropriate folders on the workstation.

For example, if your server folder was

\\OurServer\Smartware Studio\

then your Resources folders would be

\\OurServer\Smartware Studio\Resources\

and your custom templates would be stored in

\\OurServer\Smartware Studio\Resources\Custom Templates

The files in this server folder would be synchronized down to each workstation's local *\Custom Templates* folder.

Once you have created a customized file (as described in the next sections), you can distribute it to all the users in your organization by simply copying it into the appropriate Server Folder.

- Files in the Server Folder that don't exist on the user's workstation, or files on the server that are newer than version on the workstation, are automatically copied to the workstation when Smartware Studio is started.
- Files that are modified on the workstation will neither be overwritten nor automatically uploaded back to the server. Updated versions will need to be copied to the Server Folder manually.

Custom Template Documents

There are six documents used by Designer that, when added to your project, are created by duplicating a Template version of the document. These are:

- Blank Drawing (Visio)
- Table of Contents (Visio)
- Valve Legend (Visio)
- Valve Schedule (Excel)
- Air Flow Schedule (Excel)
- Damper Schedule (Excel)

It is common to create customized versions of these files that may include, among other changes, your company's logo and address. To do so, you will want to following a simple procedure of copying the default version of the template to a new name (e.g. *Acme Valve Schedule*), modifying the copy and distributing then that new file to all the users.

- You must not modify the template files that are installed with Smartware Studio. These files are likely to be erased and/or updated by new installations.

Custom Template Locations

The installed versions of the template files are located in the *Templates* sub-folder of your workstation's installation directory, such as:

C:\Program Files\Smartware Technologies\Smartware Studio\Templates\Visio
C:\Program Files\Smartware Technologies\Smartware Studio\Templates\Excel

When you duplicate one of these files, you should copy it into your *Custom Templates* folder, as described earlier in the chapter. For example, on Windows XP this is usually:

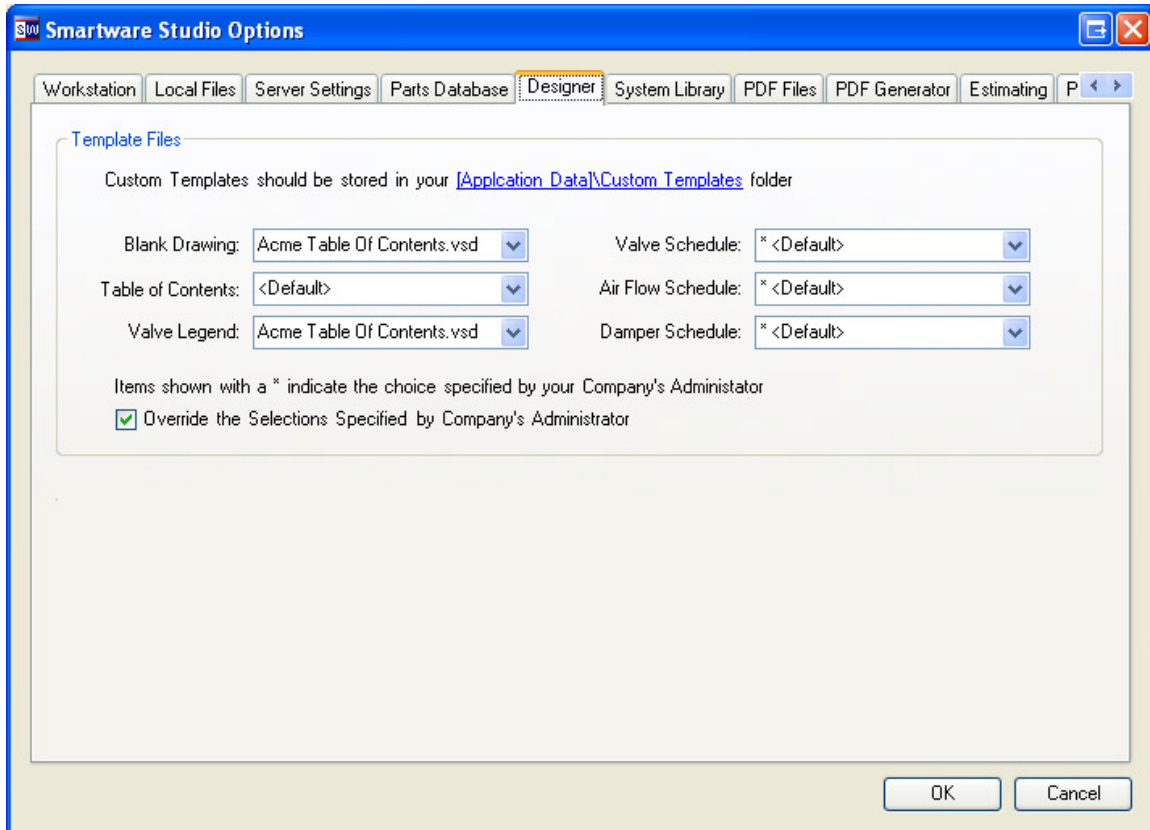
C:\Documents and Settings\All Users\Application Data
Smartware Studio\Custom Templates

Finally, to distribute it to all users in your organization, copy it to the distribution folder on your server, such as:

\\OurServer\Smartware Studio\Resources\Custom Templates

Selecting a Custom Template

In Designer Suite 2005, you would select the name of each template file to use in the **TOOLS→OPTIONS** dialog on the *Paths and Template Files* tab. This feature has been moved to the *Designer* tab:

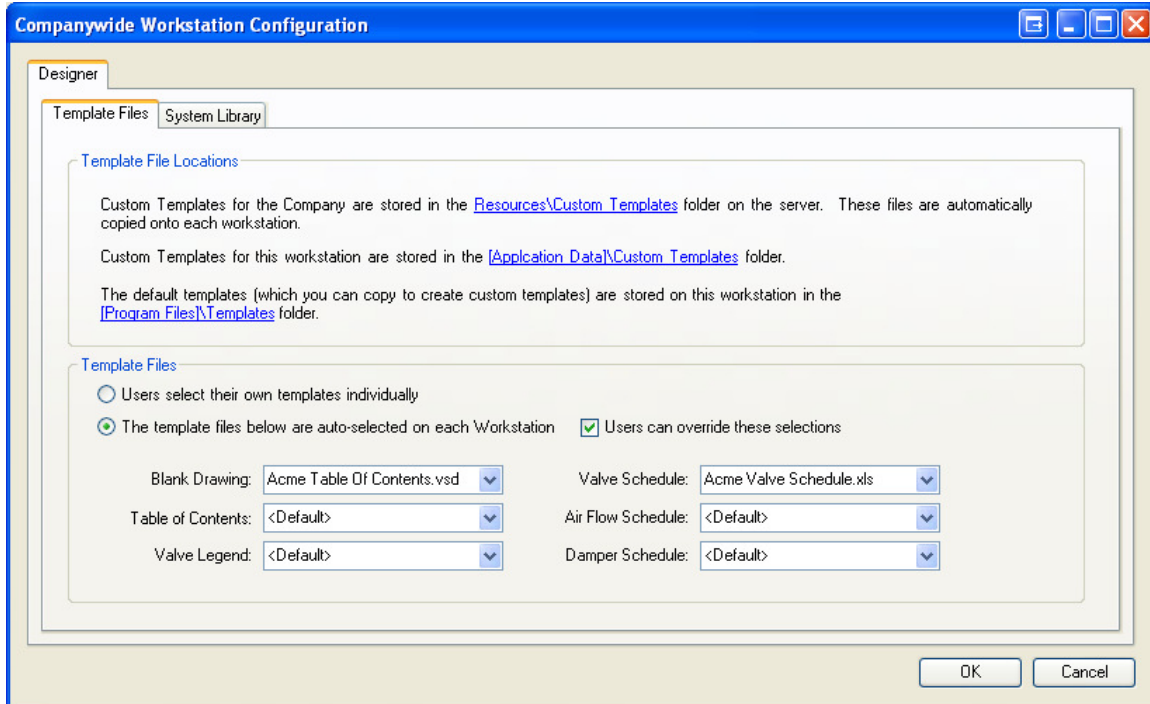


- Whereas in Designer Suite 2005 you could browse to each file in separate folders, here you are given a list for each document of the installed version of the files and any files you have stored in your *Custom Templates* folder.
- An administrator can select the choices for all users in an organization (see next section), and determine if each user can override these selections.

Distributing and Auto-Selecting Custom Templates for an Organization

If you are an Administrator for your organization, you can specify the templates that each user should have selected. This reduces the amount of setup you need to do for each user's workstation and ensures everyone is using the same template files.

To control the distribution, select ADMIN→DESIGNER MODULE MANAGEMENT:



- There are quick links to the locations where Custom Template files are stored on the server and on the workstation.
- Once copied onto the server, the template files can be selected. These files and selections will automatically push down to each workstation the next time they start Smartware Studio.
- There are options that allow you to decide if each user can override these selections.

Customizing the Blank Drawing File

When you ask Designer to insert a new blank Visio Drawing file, it begins with a copy of the file listed as *Blank Drawing* in the *TEMPLATE FILES* preferences. You can create a custom version of this file to include a set of stencils that should always be opened by default, or other standard drawing elements such as a title block.

You must always start your customizations on the default version included with Smartware Studio (*Blank Designer Suite Drawing.vsd*), which contains underlying program code necessary for the drawing to communicate with the Project Explorer.

Custom Blank Drawing files created with Designer Suite 2005 should work unchanged, as they will be upgraded automatically when they are opened.

Customizing Valve, Damper and Air Flow Schedules

The template Excel files that are used for the Valve, Damper and Air Flow Schedules are fairly sophisticated in that they allow Smartware Studio to read the part information into the Project Database to include the parts in material reports. You should exercise some caution when editing these files. It is recommended that you not insert or remove rows or columns, as Designer expects to find certain information in specific cells.

If you do want to make more sophisticated changes, refer to the chapter on *Valve, Damper and Air Flow Schedules* in the Designer User's Guide.

Custom Visio Stencils

In Designer Suite 2005 you may have created custom Visio Stencils (.vss files), which contained:

- Custom Visio Shapes
- Custom SmartCloned Shapes
- Customized versions of Designer shapes (such as the Title Block)

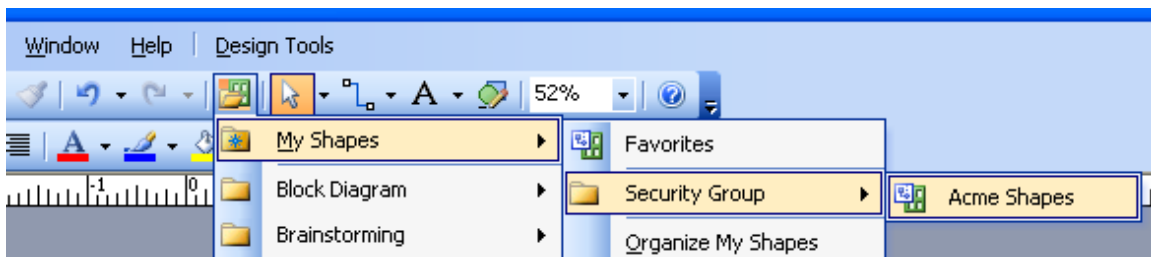
Visio Stencil Files Locations

In Designer Suite 2005, custom stencils are stored in the same folder as the installed Designer Suite 2005 stencils (generally *C:\Program Files\Designer Suite 2005\Stencils*).

As described in the last chapter, in Smartware Studio the installed stencils end up in a new folder on the Shapes menu. Unfortunately, due to a Visio limitation it is not possible for your custom stencils to be placed here. Instead, your custom Visio Stencils should be stored in Visio's preferred location:

\My Documents\My Shapes

By copying your stencils here, they will appear off the MY SHAPES menu at the top of the Visio Shapes menu:



You can create your own menu structure by creating sub-folders in the *My Shapes* folder. In this case, the *Acme Shapes.vss* file was stored in:

\\My Documents\\My Shapes\\Security Group\\Acme Shapes.vss

Smartware Studio does not rely on the Visio Stencil path as Designer Suite 2005 does.

Creating and Using Custom Stencils and Shapes

You can create your own shapes, either from scratch (as Smart Clones) or by modifying an existing shape from a Designer stencil. If you do, there are several critical rules you must follow:

- Never store your shapes in the Designer stencil files. These files will be overwritten every time Designer is updated.
- Never copy one of our stencil files to use for storing your shapes. Our stencils contain underlying code and names that may conflict with themselves if duplicated. Moreover, if this code changes significantly, those custom versions will be out of date and cause further conflicts.
- Always store your shapes in blank stencils created from the Visio FILE→SHAPES→NEW STENCIL command.
- Never name your stencil files with the same name as one of the Designer Suite standard stencils
- Refer to the *Designer User's Guide* for more detail on creating these customizations.

Distributing Custom Stencils

To distribute custom Visio stencils to all of the users in your organization, copy them to your server's Resources folder, such as:

\\OurServer\\Smartware Studio\\Resources\\DS Stencils

The stencil files in this folder will automatically be copied to each user's *\\My Documents\\My Shapes* folder when Smartware Studio is launched.

Customizing the Title Block

Refer to the Designer User's Guide for step-by-step details on customizing the Title Block shape to include your company's logo and address.

Custom Reports

As described in the previous chapter, the Design Module contains two tabs for generating reports: *Reports* and *Reports (DS 2005)*.

If you have custom reports from Designer Suite 2005, you can continue to use these on the Reports (DS 2005) tab. You will likely want to update these eventually to use the new features available for new reports (such as generating multiple reports to a single workbook and generating a PDF version of the generated reports).

Installing Existing DS 2005 Custom Reports

To use your existing Designer Suite 2005 report templates on your workstation, copy them into your Local folder (as described earlier in this chapter):

For Windows XP, the folder is usually:

*C:\Documents and Settings\All Users\Application Data\
Smartware Studio\Reports\Designer Suite*

For Windows 7, the folder is usually:

C:\ProgramData\Smartware Studio\Reports\Designer Suite

To distribute the report templates to all users automatically, copy them to your server's distribution folder, such as:

\\OurServer\Smartware Studio\Resources\Reports\Designer Suite

Custom Parts

In Designer Suite 2005, the Parts Database was a single Microsoft Access database file (*Parts.mdb*) that was distributed with and updated in each new setup file. You could change the default Discount Multipliers for each vendor and add your own parts using the Database Manager (aka the *Database Import Wizard*).

Smartware Studio introduces a whole new Parts Database Manager. The key new features are:

- The entire Parts Database is now stored in your SQL Server database.
- With a single button click you can synchronize all the parts and prices to the central Smartware version of the Parts Database.
- With another single button click you can distribute a copy of the Parts Database to all the users in your organization.
- You can add and edit custom parts on an individual basis.
- You can import a set of parts from an Excel worksheet using an updated Import Template.

- You can update values in a set of parts from an Excel worksheet.

You should read the *Parts Database Manager* chapter in the *Setup and Administration Guide* for full details on how to initialize, configure, update and distribute the Parts Database.

Importing Custom Parts from Designer Suite 2005

If you had custom parts that you were adding to the Parts Database in Designer Suite 2005, you were essentially merging them into the *Parts.mdb* file every time the database was updated with a new setup file.

In Smartware Studio, you will now add these to the database once and they will exist permanently regardless of when the program is updated or of when the parts maintained by Smartware are updated or augmented.

Once you have setup the Parts Database as discussed in the *Setup and Administration Guide*, you will want to do the following to bring in your custom parts (section names are references to the chapter in the *Setup and Administration Guide*):

- If necessary, create a new Company record for any custom Manufacturers or Vendors (see *Adding a Manufacturer or Vendor*).
- Create a Discount Multiplier record for any custom Vendors (see *Updating or Adding a Discount Multiplier*).
- Transfer the data in your existing Designer Suite 2005 Parts Database Manager Import Sheets to the new format of Smartware Studio (see *Importing Multiple Parts*):
 - Some columns will be transferred to the same column name (e.g., *Description*, *DescriptionShort*)
 - Some columns will be transferred to a new column name (e.g., *MfgPartNumber* goes to *PartNumber*, *MfgListPrice* goes to *VendorListPrice*).
 - Some columns will need new values (the text-valued *VendorID* and *MfgID* have been replaced with numeric *VendorUID* and *MfgUID*).
 - Some columns are new.
 - All the columns are described in the template generated by the *Import New Parts* screen.
- Import your custom parts.