



***Builder* 360™**

3.32.0 Upgrade Instructions

Server, Terminal Servers and Workstations

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Hours You can reach us Monday through Friday, 6:30 AM to 3:30 PM Mountain Time.

Webinars and Training Classes

For a list of upcoming Webinars, go to our web page at www.constellationhb.com and select the **Webinars** tab. From the 'Select a product' drop-down menu, choose Builder 360 and press **Apply Filter**.

To register for a class, locate the class you would like to attend and click **Enroll Now!** to view the Event Information (Event Status, **Registration** link, Date and time, Program, Duration and Description). All class times are displayed as **Eastern Standard Time**. To view class times in your own time zone, press the **Change time zone** link to update.

A registration confirmation will be sent to your email address. Do not disregard this email as it contains the link to join the class and the password to attend. It also contains instructions on how to add the scheduled class to your Outlook Calendar.

Important Reminders

- Builder 360 version 3.32.0 can only be downloaded and installed for *active* customers running version 3.31.0. If an older version of Builder 360 is being used you will not be able to install this update. Contact Builder 360 Support for more information about upgrading to the current version.
- Read through the **3.32.0 Upgrade Instructions** before registering for the 3.32.0 Overview Class or scheduling your upgrade.
- Contact Builder 360 Support at least **two (2) days in advance** of performing the upgrade to obtain your User ID and Password.
- The Builder 360 Administrator (person installing the upgrade) must attend one of the 3.32.0 Overview Classes prior to obtaining the User ID and password and installing the 3.32.0 upgrade.
- Verify that the latest updates for Microsoft .NET Framework are installed prior to upgrading; Minimum requirement on Server Hosting the Master Client is **.NET 3.0**.
- Verify or update the login properties for the **bse** use on your SQL Server hosting the Builder 360 database. See **Pre-Upgrade Checklist** on next page for details.
- A new version of the Patch Download and Installation Manager (PDIM) will need to be installed on the server.
- Allow enough time to upgrade the server(s) and all workstations. The average upgrade should take *approximately* 1 hour on the server. This time will vary for each organization based upon staff and setup.
- **All users must be out of Builder 360 while upgrading!** Users should not attempt to open up Builder 360 during the upgrade process.
- Builder 360 version 3.32.0 must be installed no later than **Friday, March 26, 2010**.



Customers who have not upgraded to version 3.32.0 by March 26, 2010 will be placed on "Version Support Hold".

PRE-UPGRADE CHECKLIST

- I have attended the 3.32.0 Overview class
- I have read through and understand the 3.32.0 Upgrade Instructions
- I have obtained the Builder 360 **3.32.0 Password** from Builder 360 Support and copied to page 7.
- I have obtained our Account's Primary Contact's **User ID** required for our new License Key and have copied to page 10.



The User ID and Password will only be given to *active* customers running Builder 360 version 3.31.0 and who have attended the 3.32.0 Overview class.

- From the Start > Control Panel > Add/Remove Programs, I have confirmed the servers and workstations have the following Third Party software:
 - **Microsoft .NET Framework 3.0 or greater** - *change from previous version!*
 - Verify you have at least 3.0 or higher (Server only) or you will be unable to open the Configuration Manger and proceed with the upgrade.
 - **Microsoft Office Professional 2003 or Access 2003** (strongly recommended)
 - OR
 - Microsoft Office Professional 2007 or Access 2007
 - OR
 - Access 2002 Runtime (compatible but not recommended)
 - **Builder360PrerequisitesInstaller ***
 - **Crystal Reports for .NET Framework 2.0 ***



Third Party Installation files (*) can be found on our Product Download Page. Download and copy the installation files to a **local drive** on the server or workstation and run from that location (i.e. C:\Program Files\Builder 360 Installation Files) and NOT from a shared network location. These Installation files should be installed before installing Builder 360 for the first time.

- SQL Server** - I have confirmed that the login properties for the **bse** on my SQL Server hosting the Builder 360 database are setup as follows:
 - The **bse** user has a server role of **System Administrator**
 - The **bse** user has a database role of db_owner for both the **builder** and the **master** databases



If the **bse** user is not setup as a System Administrator or assigned as a db_owner to both the **builder** and the **master** database, the upgrade process will be unable to execute the script to install Builder 360 error messages and the process will fail.

- SQL Server** - I have a backup copy of our builder database
- Server Hosting Builder 360 Master Client and Local Workstations** - I have backup copies of all custom reports located under any of the Constellation folders.

I. SERVER UPGRADE INSTRUCTIONS



The Server Upgrade installation occurs on the server hosting the Master Client (shared) version of Builder 360 and is performed by the Builder 360 or IT Administrator.

- 1 Create backup copies of all custom reports located under the ConstellationHB folder and move to a temporary file location. Custom reports may include the following:

- A bwAux.mdb file (under Builder\bin folder)
- B AccessBuilder.mdb
- C Custom Pivot Table reports (under Pivot Table folder)
- D Custom Import spreadsheets (under Import folder)

** Your custom reports (files) will not be overwritten during the upgrade; the backups are just a precautionary measure.*

- 2 Download the updated version (1.3) of the Patch Download & Install Manager (PDIMInstaller.msi) and the Version Updater Tool for 3.32.0 (ClientVersionUpdater.zip).

- A http://www.tfmfg.com/builder360web/Builder360_Current_Downloads.htm

OR

Go to www.constellationhb.com, select **Client Care** and at top-left, select **Builder 360 Download Center**. At top-right, select the **Builder 360 Product Downloads** link.

- B Select the **Patch Download & Install Manager (PDIMInstaller.msi)** and save to a temporary file location (i.e. Desktop) on the server where the Builder 360 Master Client is currently installed.



[Patch Download & Install Manager \(PDIMInstaller.msi\)](#)

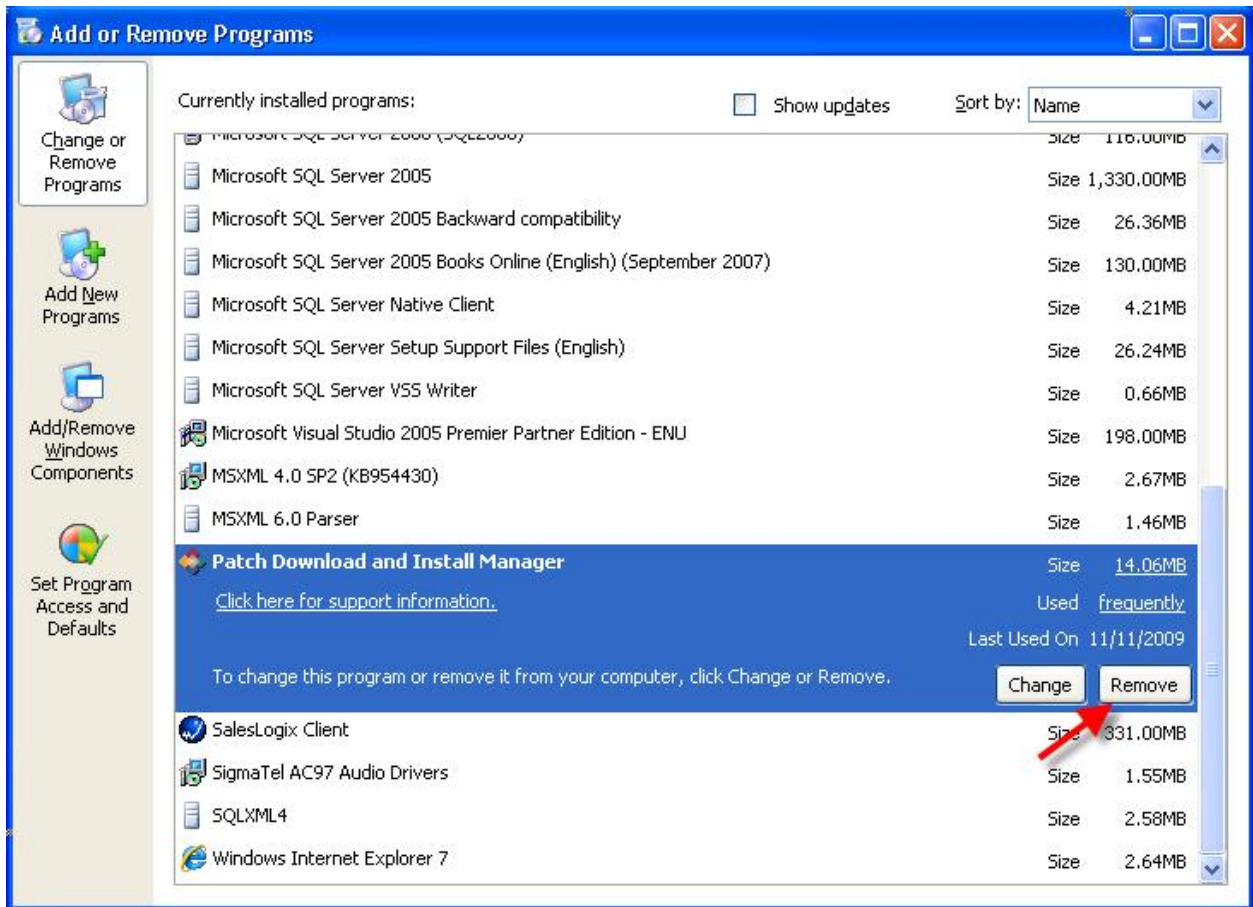
- C Select the **Version Updater Tool for 3.32.0 (ClientVersionUpdater.zip)** and save to a temporary file location (i.e. Desktop) on the server where the Builder 360 Master Client is currently installed.



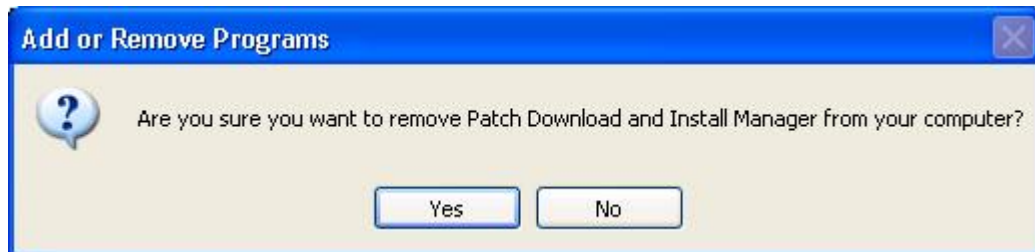
[Version Updater Tool for 3.31.0 \(ClientVersionUpdater.zip\)](#)

- Do **NOT** save this file to [Program Files]\ConstellationHB\Builder360\PDIM folder as this will be removed when uninstalling PDIM.

- 3 Uninstall the current version of PDIM on the server and delete the Desktop shortcuts if needed.
 - A Go to **Control Panel > Add/Remove Programs** and wait for the list to populate.
 - B Locate the **Patch Download and Install Manager** program and PRESS **Remove**.



- C Click **Yes** at the prompt to uninstall PDIM.

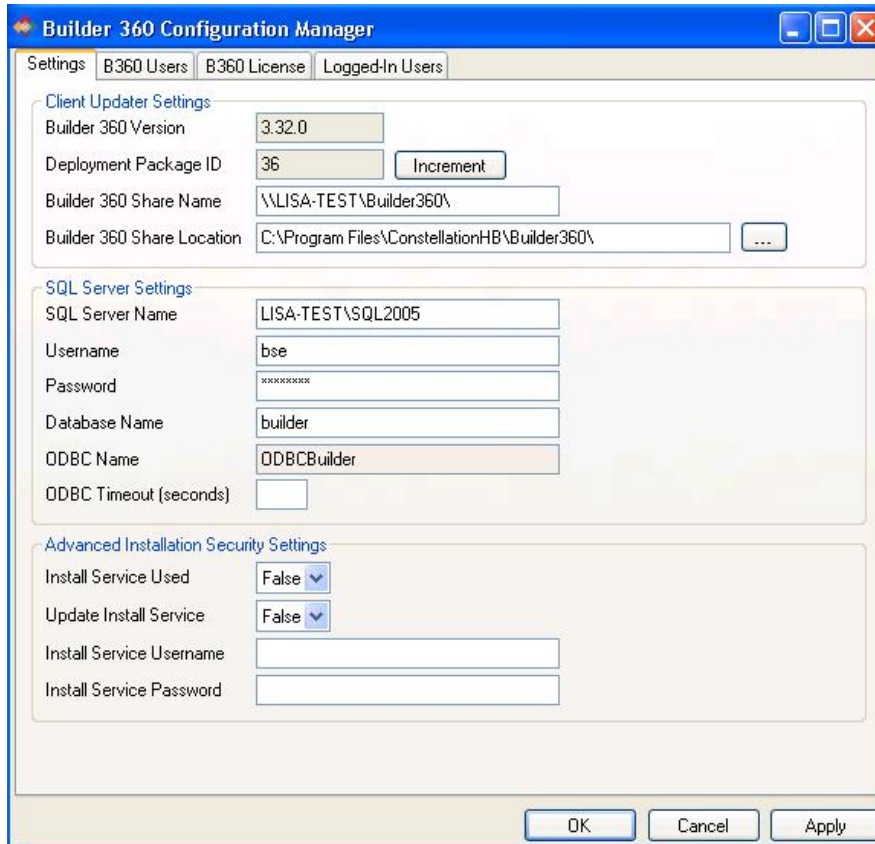


- 4 Install the new program version (1.3) of the Patch Download and Install Manager.
 - A Locate the **PDIMInstaller.msi** file from step 2B above and execute (double-click) to install PDIM version 1.3.
 1. Click **Run** and then **Next >** two times to install PDIM; use existing default settings.

2. Click **Next** > 2 more times to complete the installation.
3. PRESS **Close** when the message prompt, "Patch Download and Installation Manager has been successfully installed" appears.

5 IMPORTANT! Confirm and Apply B360 Configuration Manager Settings.

- A Select the **B360 Configuration Manager Desktop shortcut** to open.



- B Under the **Settings** tab, confirm and/or update the following:

Client Updater Settings

Builder 360 Version: 3.32.0
 Deployment Package ID: automatically assigned (unique to your organization)*
 Builder 360 Share Name: **your server name\Builder360**
 Builder 360 Share Location: **C:\Program Files\ConstellationHB\Builder360**

SQL Server Settings

SQL Server Name: **your SQL server name**
 Username: bse
 Password: password (or your default password)
 Database Name: Builder (or builder)
 ODBC Name: ODBCBuilder
 ODBC Timeout (seconds): recommend **leaving blank** for a default of 60 seconds

Advanced Security Installation Settings

EXAMPLE 1 – for customers **NOT** using the Builder360InstallService

Install Service Used: False
Update Install Service: False
Install Username: *leave blank*
Install Password: *leave blank*

EXAMPLE 2 – **ONLY** for customers using the Builder360Install Service

Install Service Used: True
Update Install Service: False
Install Username: **the user name displayed**
Install Password: **the user password displayed (masked)**



If the Advanced Security Installation Settings default in as **True** with a Username and Password, please **do not** change or delete these settings. These settings are used with the Builder360InstallService that installs and updates Builder 360 on workstations. The Builder360InstallService is **ONLY** necessary when the IT administrator has implemented security measures that prevent Builder 360 users from installing applications on their own workstations; that is, when users do **NOT** have Administrative Permissions on their own computers. For more information on this Service, please contact Builder 360 Support.

C Click **Apply** or **OK** to save your changes and close the utility.



VERY IMPORTANT! These settings must be saved at least once by clicking **Apply** and/or **OK** to update the ClientUpdater.xml file. Pressing **Cancel** or using the **RED X** after reviewing these settings will NOT save the proper configurations that are required to install version 3.32.0

6 Extract and execute the **Version Updater Tool for 3.32.0** (ClientVersionUpdater.zip).

- A Locate the **ClientVersionUpdater.zip** file from Step 2 C above (i.e. Desktop or temporary file location).
- B Open and Extract all files to the following location:

C:\Program Files\Constellationhb\Builder360\PDIM folder



WARNING! After you have extracted the files, verify that the **ClientVersionUpdater.exe** file is located directly under the **PDIM folder** and **NOT** in a subfolder underneath it. If it is located in a subfolder, move it back into the PDIM folder.

- C A prompt box will appear asking, "*Would you like to replace the existing file?*" Click Yes To All.
- D Another prompt box will appear stating "*Please enter the password in the box below.*" ENTER the **PASSWORD** obtained from Builder 360 Support and click **OK**.



* Password obtained from B360 Support

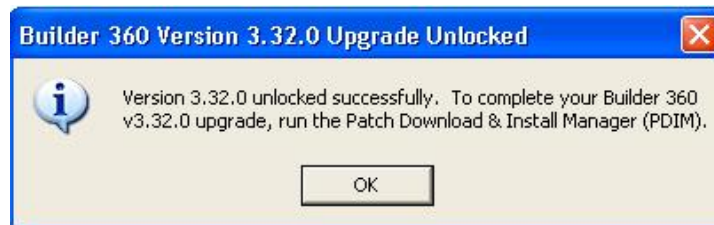
E Select **Finish** when the message prompt states, "Extraction Complete"

7 Browse to and EXECUTE the **ClientVersionUpdater.exe** file.

A Navigate to **ClientVersionUpdater** under the C:\Program Files\Constellationhb\Builder360\PDIM folder.

B Select the file (double-click) to run the ClientVersionUpdater tool.

C Click **OK** at the message prompt stating "Version 3.32.0 unlocked successfully. To complete your Builder 360 v3.32.0 upgrade, run the Patch Download & Install Manager (PDIM)."



8 Confirm all users are logged out of Builder 360, and that the Builder 360 Master Client version is closed and Microsoft Access is not running on the server.

9 **Disable** any Anti-Virus programs (*temporarily*) prior to running PDIM; some Anti-Virus programs may block the update from being installed.

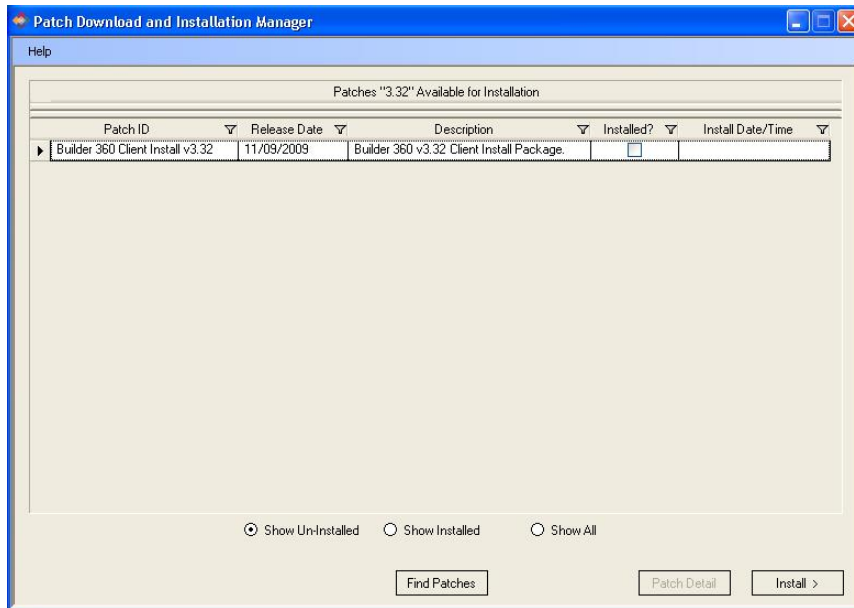
10 Install version 3.32.0 using the **Patch Download & Install Manager** utility (PDIM) located on your server desktop or under Start > All Programs > ConstellationHB > Builder 360 > Patch Download & Install Manager.

A Double-click PDIM to open up the utility.

B Click **Find Patches** to display *Builder 360 Client Install v3.32* in the grid of PDIM indicating it is available for you to download and install.



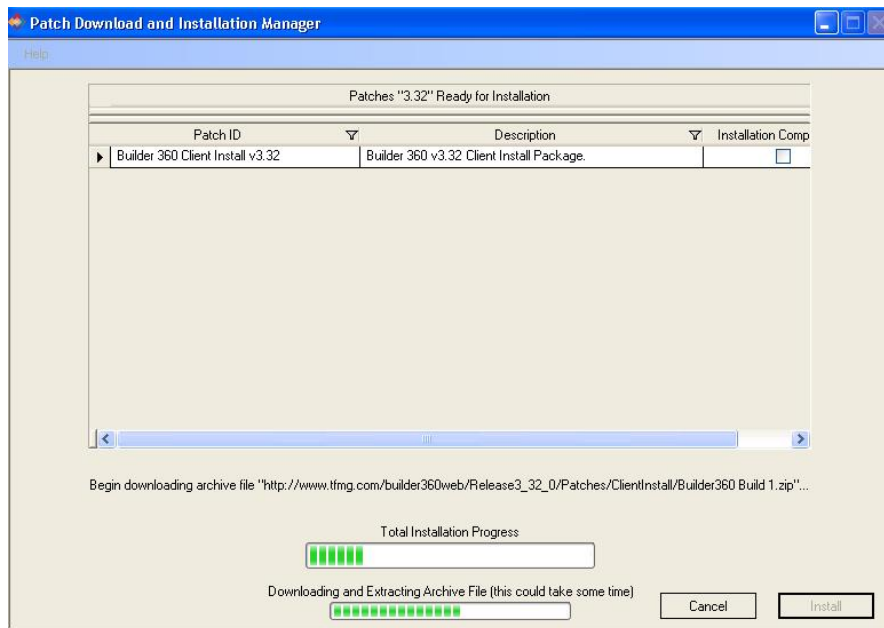
Additional updates may be displayed depending upon when you install the 3.32.0 upgrade. These patch updates will also be installed during the upgrade process to ensure you have the latest version installed. For patch updates, you may be required to click **OK** through message prompts.



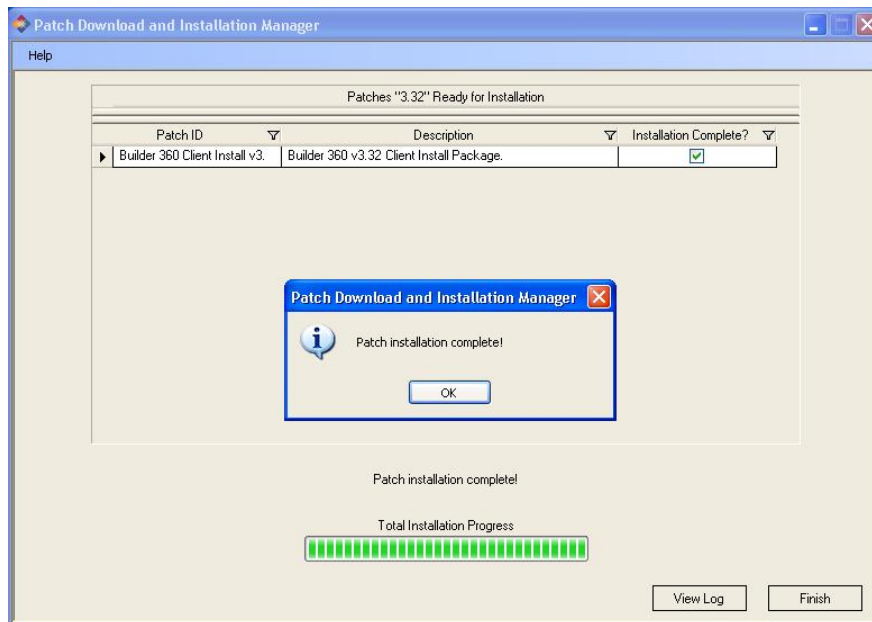
C Click **Install >**, then **Install** and **Yes** to begin the upgrade process.



DO NOT INTERRUPT THIS PROCESS! This will take approximately 10-15 minutes. This process may take shorter or longer depending upon your server and/or internet connections.



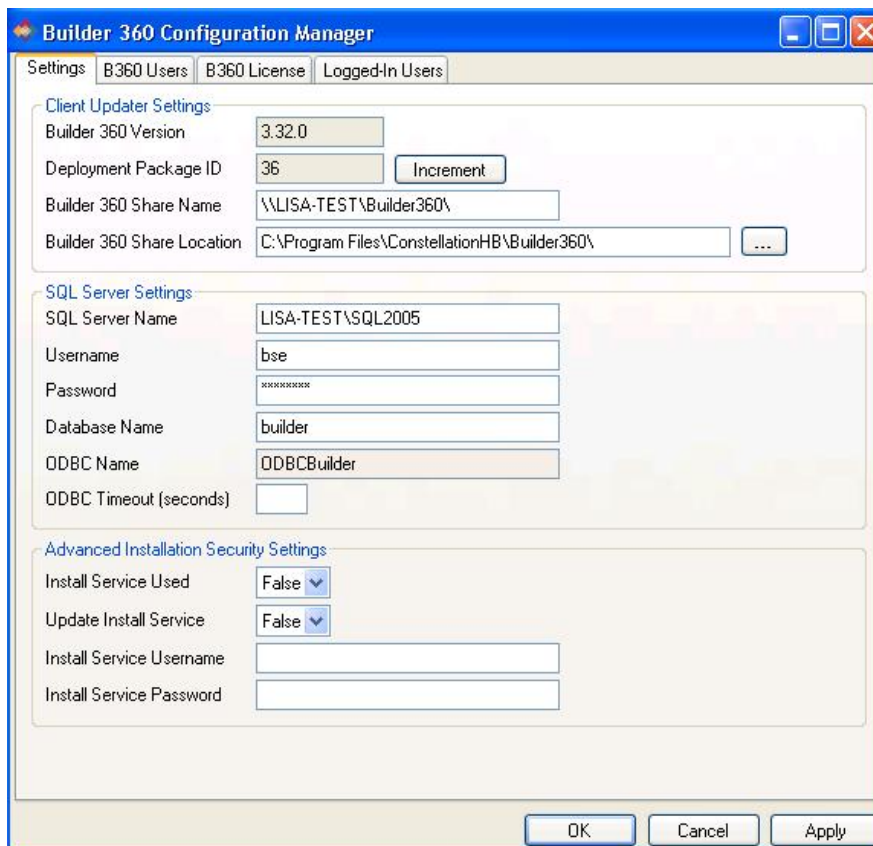
D When the "Patch installation complete!" prompt appears, click **OK** and then press **Finish** to close PDIM.



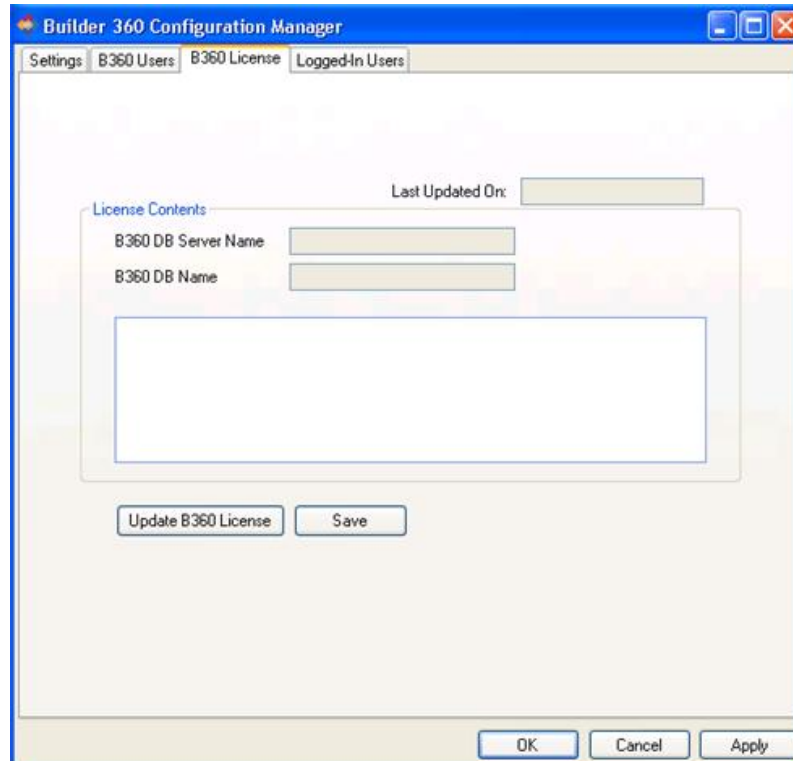
E **Re-enable** any Anti-Virus programs you disabled prior to running PDIM.

11 NEW / REQUIRED! Create and update Builder 360 with a NEW Builder 360 License Key.

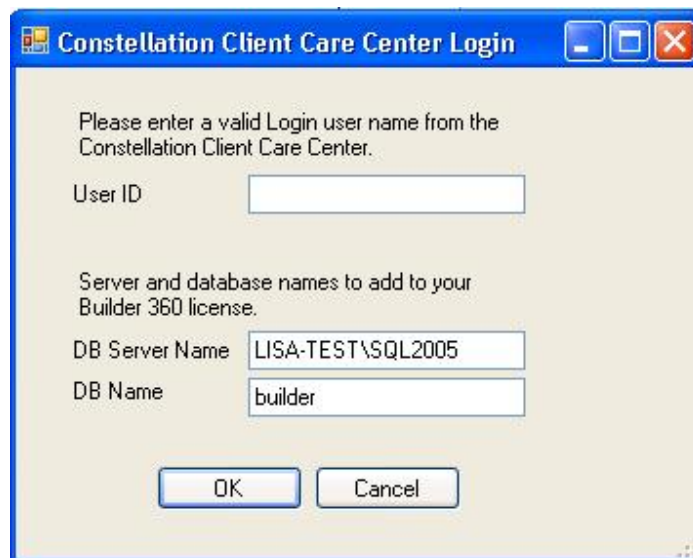
A Select the **B360 Configuration Manager Desktop shortcut** to open.



- B Select the new **B360 License** tab to create and apply your new Builder 360 License Key. The first time you view the form will be blank.

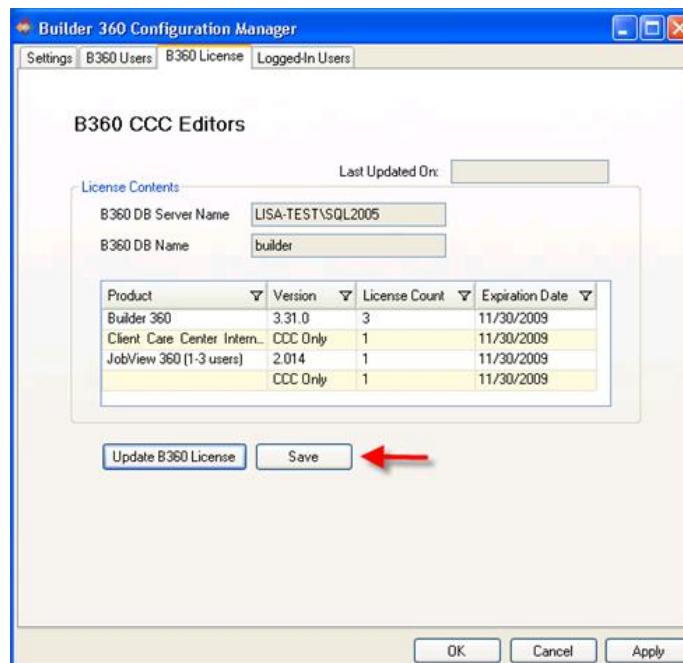


- C Click **Update B360 License** to open up the Constellation Client Care Center Login form; your DB Server Name and DB Name will be populated based upon your Configuration Settings
- D Enter the **User ID** for your Account (provided by Builder 360 Support) and click **OK**



** User ID obtained from B360 Support*

- E **Verify** the grid is now populated with the Version, License Count and Expiration Dates for each of your Constellation's product(s).



- F **IMPORTANT!** Click **Save**.

- A **Save Succeeded** message prompt will appear stating "The Builder 360 license key was successfully saved." Click **Ok**



- G Click **Apply** or **OK** to save your changes and close the utility.

12 Verify your custom report (bwAux.mdb file) is still displayed in the ConstellationHB folder (**ONLY** if custom reports are managed on the Server)

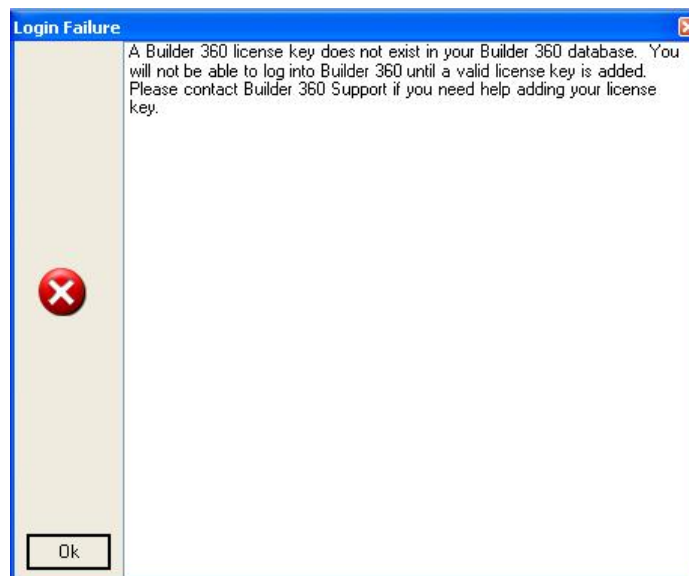
- A If the file is displayed, proceed to Step 13.
- B If the file is not displayed, locate the copy of your **bwAux.mdb** file from Step 1 and copy into the C:\Program Files\ConstellationHB\Builder360\bin folder.

13 Open up the **Builder 360 Master Client** on the server (bse.mdb)

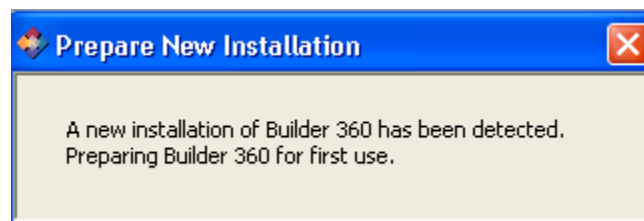
- A Double-click on the new **Builder 360 Master Client** shortcut or select Builder 360 Master Client from the Start menu.



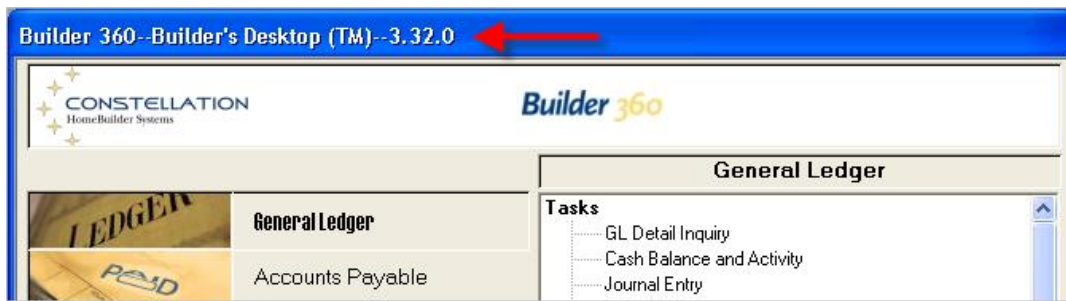
WARNING! If Step 11 was missed after upgrading the server the following Login Failure message will appear upon the initial load of the Builder 360 Master Client. Go back and complete Step 11 prior to opening up Builder 360 Master Client.



- B Builder 360 will run through the update process and state, *"A new installation of Builder 360 has been detected. Preparing Builder 360 for first use."*



- C When the program opens, enter the user name and password (if needed) and confirm that version **3.32.0** is showing in the top left corner.



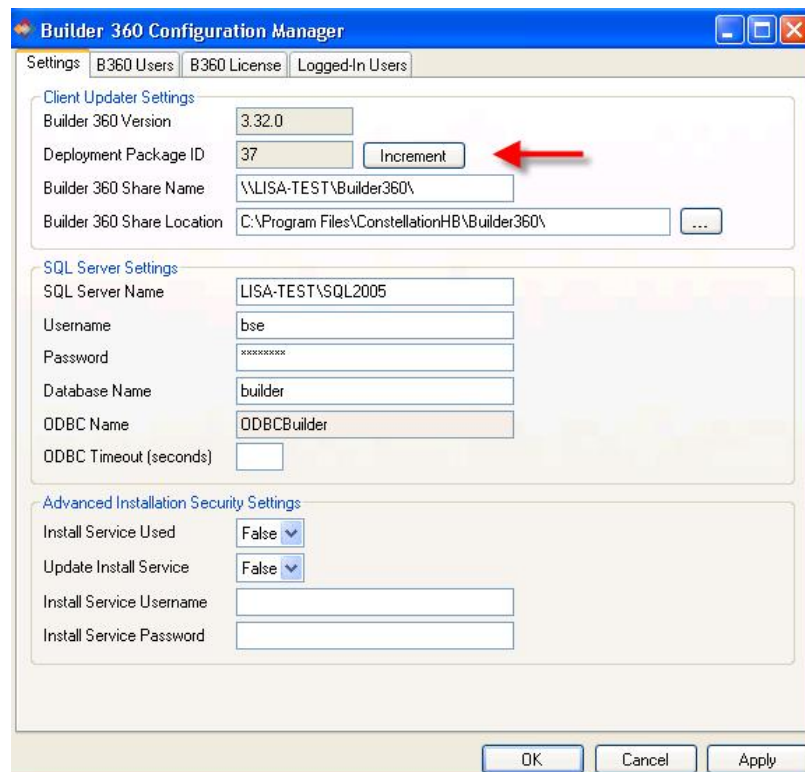
IMPORTANT! Steps 14 and 15 are required for **ALL CUSTOMERS** after any update to the Builder 360 Master Client; including a new version upgrade, periodic software updates (i.e. patches) or changes to your custom reports (bwAux.mdb file).

14 Import Custom bwAux Objects on Server

- A While Builder 360 is open on the server, navigate to **Setup and Preferences > System Parameters**
- B Select the **Hammer and nail** icon (System Maintenance) and click **OK** when the System Administrator warning appears.
- C Press **Import Custom bwAux Objects**; let the import run until a *successful confirmation* message appears.
- D Click **OK** and close the forms and Builder 360.

15 **IMPORTANT!** Open up the B360 Configuration Manager tool to confirm, update and **Apply** settings.

- A Select the **B360 Configuration Manager Desktop shortcut** to open.



- B Press **Increment**
- C Click **Apply** or **OK** to save your changes and close utility

The **SERVER** Installation is complete!



Proceed to your applicable Workstation and/or Terminal Server Upgrade Instructions on the following pages. Skip any instructions that do not apply to you.

II. TERMINAL SERVER UPGRADE INSTRUCTIONS - NOT HOSTING BUILDER 360 MASTER CLIENT

Below are the instructions for installing Builder 360 on a Terminal Server that **DOES NOT HOST** the Master Client of Builder 360.

Terminal Server Checklist

- I have logged onto the Terminal Server under an Administrator's account
- I have confirmed the Target for my Builder 360 Desktop Shortcut is pointing to "C:\Program Files\ConstellationHB\Updater\B360ClientUpdaterEXE.exe".
- I have confirmed User profiles are setup and exist for all remote users needing access to Builder 360 on the Terminal Server (under C:\Documents and Settings).
- I have confirmed all B360 User profiles have been setup in the Builder 360 Configuration Manager.

Upgrade Builder 360 on the Terminal Server

- 1 Logged in as the Administrator, double-click on the **Builder 360 desktop shortcut** to initiate the Builder360 Client Update process.



DO NOT INTERRUPT THIS PROCESS! Builder 360 will open up automatically upon successfully updating Builder 360 for the administrator and all B360 Users.

- 2 Have each B360 User log-in and confirm Builder 360 3.32.0 is displayed as their current version.



- **The Terminal Server installation is complete!**

III. TERMINAL SERVER UPGRADE INSTRUCTIONS – HOSTING BUILDER 360 MASTER CLIENT

Below are the instructions for installing Builder 360 on a Terminal Server that **HOSTS** the Master Client of Builder 360.

Terminal Server - Checklist

- I have logged onto the Terminal Server under an Administrator's account.
- I have confirmed that the Builder 360 Master Client has been opened up to recognize the updates as outlined under section I. Server Upgrade Instructions, Step 12.
- I have confirmed that the Custom bwAux Objects have been imported into the Master Client as outlined under section I. Server Upgrade Instructions, Steps 13- 15.

Terminal Server Hosting Master Client - Update

- 1 Copy the **bse.mdb** file into each Builder 360 User profile
 - A Browse to C:\Program Files\ConstellationHB\Builder360\bin folder and select the bse.mdb file. Right-click and select **Copy**
 - B Browse to one of the Builder 360 User's profile folder where the existing bse.mdb file exists.
 - C Right-click and select **Paste** to update the current version.
 - D This process will need to be repeated for each user's profile



- To save time, customers may choose to create a script (CopyBSE.bat) to run the copy/paste functions automatically; see example below.
- However, with the newly enhanced Configuration Manager we recommend installing the Builder 360 Master Client on a *different* server than the Terminal Server and using the Configuration Manager to install/update Builder 360 – this is a change from previous recommendations.

- 2 Have each B360 User log-in and confirm Builder 360 3.32.0 is displayed as their current version.



- **The Terminal Server installation is complete!**

IV. WORKSTATION UPGRADE INSTRUCTIONS

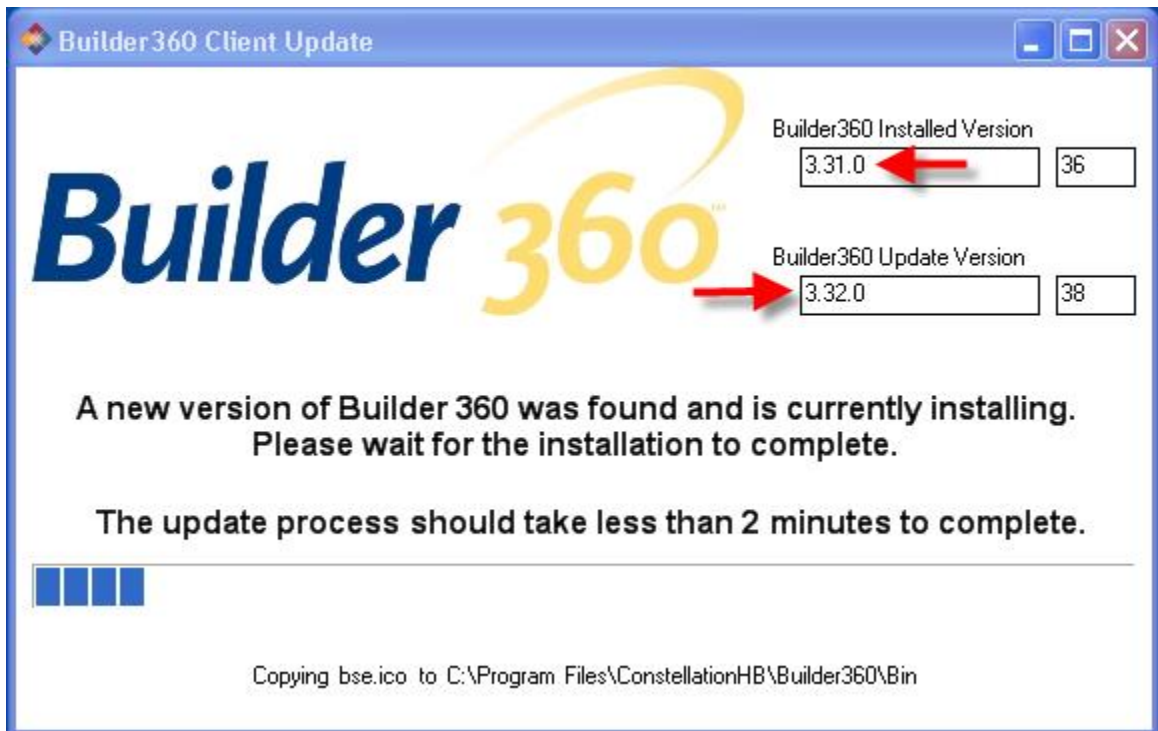
Below are the instructions for updating Builder 360 on a local workstation. Automatic update can be completed by local Builder 360 user.

Workstation Checklist

- I have logged onto the Workstation under the Builder 360 User's account.
- I have confirmed that the Builder 360 Master Client has been opened up to recognize the updates (as outlined under section I. Server Upgrade Instructions, Step 12)
- I have confirmed that the bwAux.mdb file has been imported into the master bse.mdb file, if needed. (as outlined under section I. Server Upgrade Instructions, Steps 13-15)

Workstation Update

- 1 Double-click on the logged-in user's Builder 360 desktop shortcut to install the latest version of Builder 360.
 - A The Builder 360 Client Update process will automatically launch and begin the update process on the workstation.
 - B Confirm the Builder360 Installed Version is listed as 3.31.0 and the Builder360 Update Version is listed as 3.32.0



DO NOT INTERRUPT THIS PROCESS! Builder 360 will open up automatically upon successfully updating Builder 360.

- 2 Verify that version 3.32.0 is showing at the top left corner.



WARNING! Step 3 is **ONLY** for customers that manage custom reports on each workstation (not typical and **not** recommended!) If you manage your custom reports on the server, **SKIP THIS STEP – the workstation update is complete!**

- 3 Import Custom bwAux Objects (Read **WARNING!** before proceeding with this step)
 - A While Builder 360 is open on the workstation, navigate to **Setup and Preferences > System Parameters**
 - B Click the **Hammer and nail icon** (System Maintenance) and click **OK** on the System Administrator warning
 - C Press **Import Custom bwAux Objects**
 - D Let the import run until a *Successful Confirmation* message appears
 - E Click **OK**

The Workstation installation is complete!