The purpose of this document is to get you up and running with SofTrack in 20 minutes *or less*!

Requirements

- A Windows OS machine to act as a "Server"
- One (or more) Windows OS machines to act as "Workstations"
  *Note 1: The version of Windows OS for the test machines may be Windows **Server** 2003, 2008, 2008 R2, 2012, 2012 R2, 2016 or Windows **Workstation** Vista, Windows 7, Windows 8, Windows 8.1, Windows 10*
  *Note 2: Though typically SofTrack **Server** components would be installed on a **Server** class OS, and the **Workstation** components on a **Workstation** class OS, you may choose to install both the Server **and** Workstation components on the **same machine** for testing purposes.*
- A valid SofTrack Evaluation Token. *Note: Tokens are activated on the day they are <u>sent</u>. If your token indicates it is "expired", email support@softwaremetering.com to request a new one.*

Server Prep

1. Logon with administrative level credentials to the machine you will be using as a server.
2. Create a folder on the hard drive called **STLOG**.
   Note: Use a drive that has at least 1GB of free space
3. Make this folder "shared" with the share name **STLOG** and assign the following rights:
- Share rights: Local Administrators: FULL CONTROL
                                    System: FULL CONTROL
- Security (NTFS) rights: Local Administrators: FULL CONTROL
                                    System: FULL CONTROL

Install the SofTrack Server Agent (SSA)

1. Logon with administrative level credentials to the machine you will be using as a server.
2. You will have received an email from SofTrack Support or Fulfillment with a token (*.TKN file) attached. Copy this token to your server (any location).
3. Download the SofTrack distribution using this link:
   http://www.softwaremetering.com/outgoing/softrack_full.zip
4. Unzip SOFTRACK_FULL.ZIP to C:\softrack_full\ (or wherever you'd like the SofTrack Console to reside).
   *Note: you MUST unzip the entire archive! If you execute SofTrack without first unzipping, it **will not function**!*

   (i)   From a remotely connected workstation or directly at the server, log in with permissions equal to that of the **Administrators Group**. For purposes of installing SofTrack, the account you use must have full access to the Registry of the server to which you install.

   (ii)   Run `SOFTRACK_CONSOLE.EXE`

   (iii)   Click the green **+** at the top left.

   (iv)   On the resulting screen (Figure A) Fill in the **Name of the Server for SofTrack Installation** and Name of Share fields; use the Path Assistance button to fill in both fields. This example uses **STLOG** as the share path. Click **Next**.
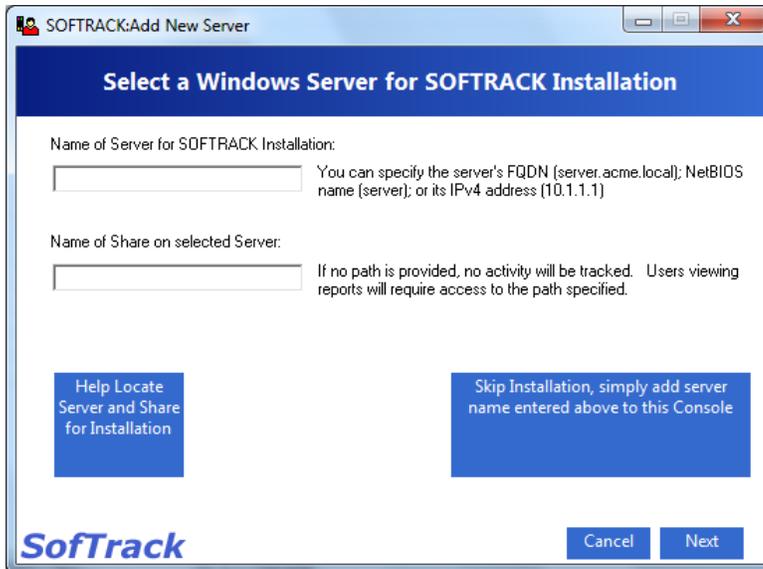
Figure A

(v)   On the resulting screen (Figure B) Use the **Locate Installation License** button to complete the **Filename of SOFTRACK License File to Install** field.   Click **Next**
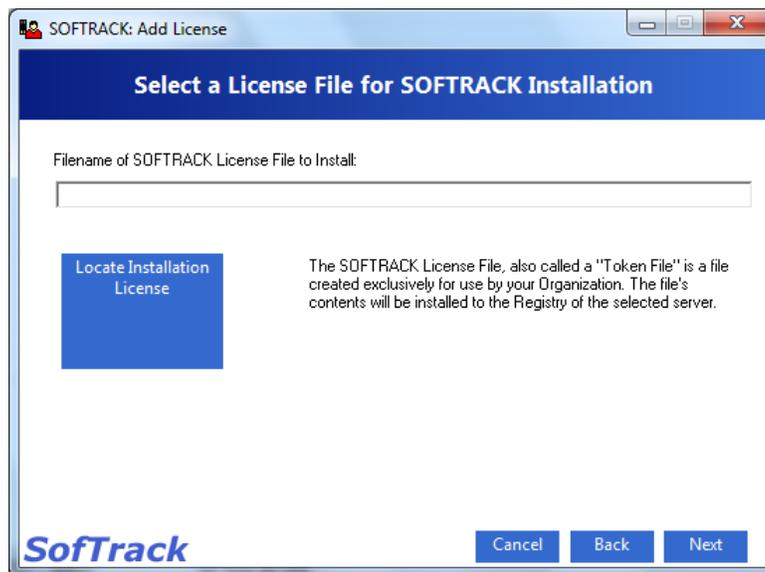
Figure B

(vi)   On the resulting screen (Figure C) confirm the desired installation option. Click **Next**
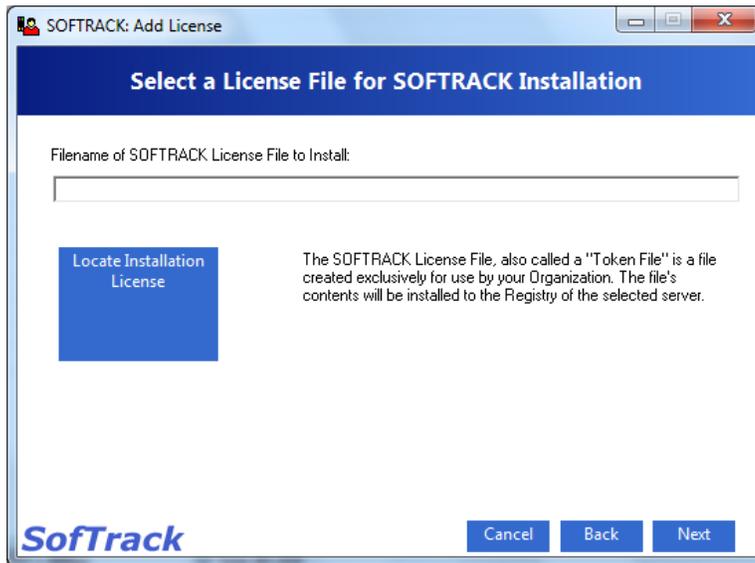
Figure C

(vii)   On the resulting screen (Figure D) verify installation details.   Click
Install
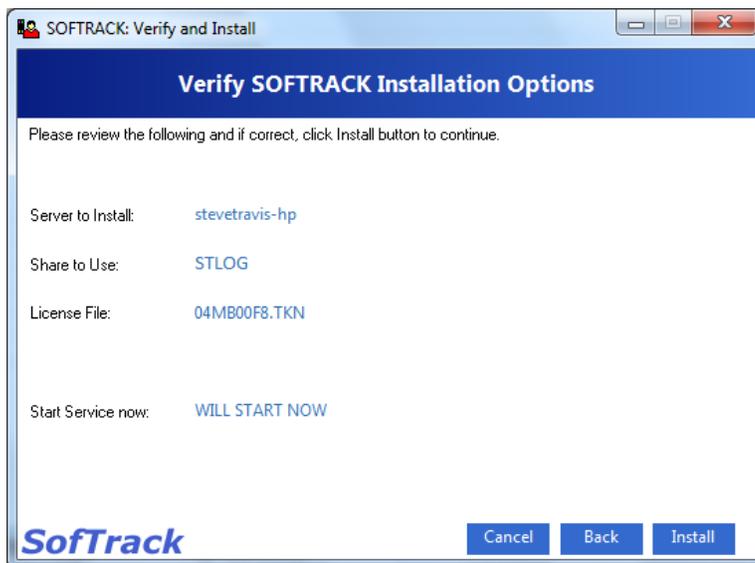
Figure D

(viii)   If this is the first time SofTrack has been installed, you will be presented with the following End User License Agreement:
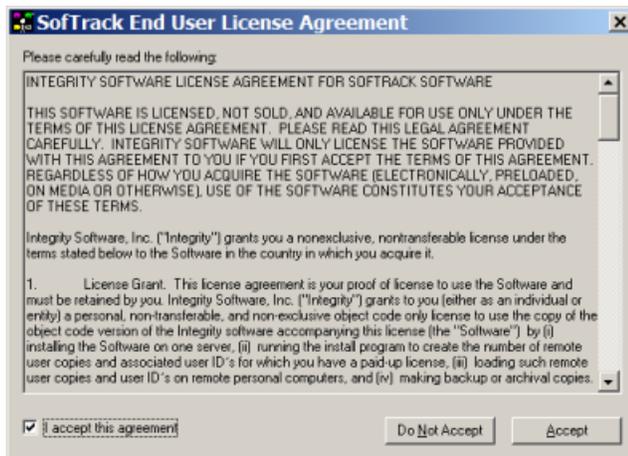
Figure E

Once Accepted a progress window such as the one shown in Figure F will appear:
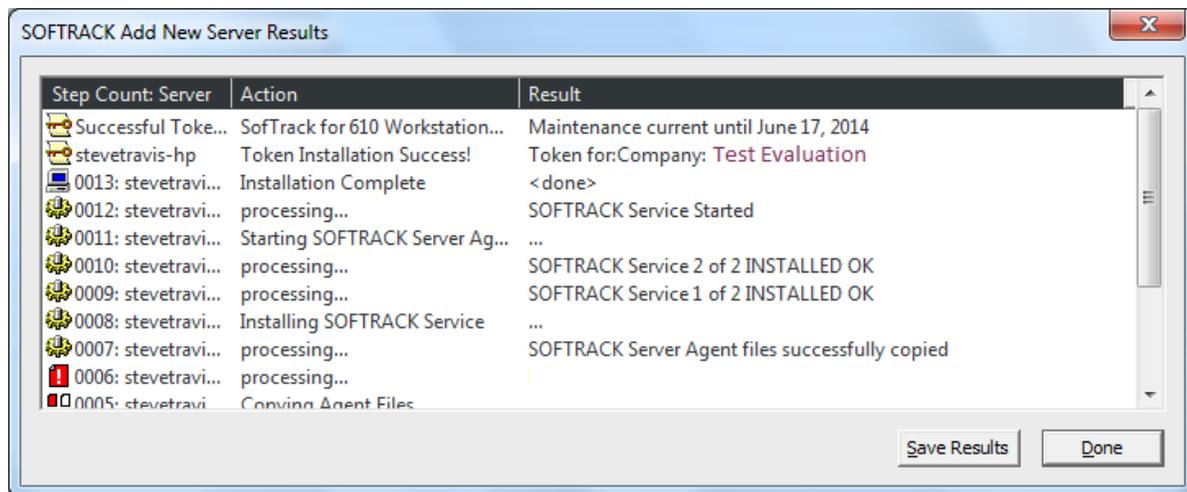
Figure F

Note: The SofTrack Service files are copied to the **%SystemRoot%\System32\Drivers** directory.
On 64-bit systems, EXE and DLL files are copied to **%SystemRoot%\SysWow64** directory.

When ready, click the "Done" button.

The installed server will now appear in the main console window on a tile at the left side (Figure G).

Figure G

The SSA (SofTrack Server Agent) should now be installed and ready for use.

Set LWA (Local Workstation Agent) Options
1. Select the "Settings" tab
2. Select the "Options" sub-tab
3. Under "SofTrack Local Workstation Agent Auditing and Control Options," select the activities you wish to have tracked
   Note 1: Tracking more activity means larger log files!
   Note 2: Tracking "File Open, Create, and Delete Attempts" drastically increases log file sizes. We recommend only tracking this activity if needed
   Note 3: For Bentley application metering purposes, choose to "Include all Application Launch Attempts (whether defined for metering or not)"
4. Click "Save Settings"

The LWA (Local Workstation Agent) settings are now set.

Setup the Test Workstation(s)
   Note: The workstation agent(s) may be installed on the Administrator's workstation or on a group of "test" workstations.
1. Select the "Agents" tab
2. Select "Push Console"
3. Retrieve your workstations using the appropriate method (…from Active Directory or from IP Address Range)
   Note: You may also right click in the list to manually enter a workstation name.
4. Select the desired workstations
5. Click "Push/Remove LWA+QIA to selected workstations"
6. Under "Quick Inventory Options"
   i.   Confirm that "Server to report" is correct (your SSA Server name)
   ii.   Check "Convert Server name to TCP/IP address for communications"
7. Under "Local Workstation Agent Options"
   i.   Confirm that "Server to report" is correct (your SSA Server name)

      ii.   Check "Convert Server name to TCP/IP address for communications"

8. Select "Stop, Update and Restart"
   Note: This selection updates and restarts the workstation agent service if it is already installed. This selection does NOT restart the workstation.
9. Set Load Delay to "0"
10. Click "Push Now"

The LWA (Local Workstation Agent) and QIA (Quick Inventory Agent) will deploy. The agents should start automatically.

Create a License Profile for Testing

1. Select the "Profiles" tab
2. Click the "+" button in the upper right hand corner and name the profile "NOTEPAD TEST"
3. Choose to "Create Software Metering Profile" and select OK
4. In the field under the "Local Windows Files to Meter" list, input
   notepad.exe
   and click "Add"
5. On the left side, select "Standard Licensing Profile"
6. In the "Maximum Concurrent Users" field, enter 1000
   Note: This number represents the maximum users allowed to use notepad.exe concurrently.
7. Click OK

The Test license profile should now exist.

Test SofTrack Operation

1. On the workstation where you installed the LWA & QIA (the test workstation), launch NOTEPAD.EXE (Notepad)
2. In the "Profiles" tab, double click "NOTEPAD_TEST"
3. Click "View Active Users" button on the right hand side.
   - SofTrack should display your test user name as currently active.
4. On the workstation where you installed the LWA (the test workstation) close NOTEPAD.EXE (Notepad)
5. In the "NOTEPAD_TEST" View Active Users Window, click "Refresh List"
   - SofTrack should no longer display your test user name as currently active in "NOTEPAD_TEST"

If your system has responded as described above, then SofTrack is up and running! If you have any trouble, please contact SofTrack Technical support via email support@softwaremetering.com or phone (512-372-8991) between the hours of 4:00a and 6:00p Central Time (GMT −6). Thank you for using SofTrack!