

# Autodesk® FMDesktop™ 2009

## Facility Manager Installation Guide

Autodesk®

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# 1 Introduction

## What is Facility Manager?

Facility Manager is part of a computer-aided facility management suite of products called Autodesk® FMDesktop that gives professionals the ability to maintain and manage critical facility information.

The following components are integral to Facility Manager:

- **Facility Manager** – The user interface of the application. It is used to view, query, markup, report on, print, and publish facility drawings and associated data or documents. Facility Manager allows users to plan, track, and manage project, work request, and move information.
- **FMDesktop Database** – The central component of the entire FMDesktop suite, the FMDesktop Database stores facility data as well as links to related documents and drawings. It is comprised of one of the following:
  - Microsoft Access
  - Microsoft Access Middleware and SQL Server
  - Microsoft Access Middleware and Oracle
- **Facility Manager Resource Folders** – The resource folders store the drawings, graphics, documents, reports, and other resources shared by all of the components of FMDesktop.

## 2 Installation Overview

### Understanding the Operating Environment

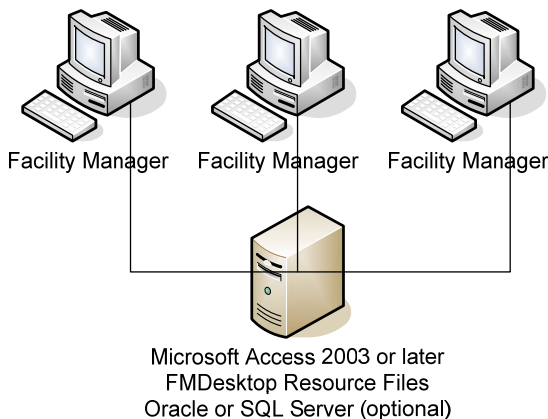
How you install Facility Manager depends on whether more than one person will be using it at your facility. You can install Facility Manager for a:

- **Single User** – The entire Facility Manager program (Facility Manager, FMDesktop database, and the Facility Manager resource folders) is installed and used on a single computer using Microsoft Access.



Facility Manager  
Microsoft Access 2003 or later  
FMDesktop Resource Files

- **Network of Users** – Facility Manager is installed on each of several client computers that share common data and resources installed on a network server. Each Facility Manager client is linked to a shared Microsoft Access database and resource folders located on the network server.



## 3 Client Hardware and Software Requirements

<b>Operating System</b>	Microsoft® Windows® XP Professional SP2, Microsoft® Windows® 2000 SP4, Microsoft® Windows® Server 2003, Microsoft® Windows® Vista (Enterprise, Business, Ultimate, Home Premium), and Microsoft Data Access Components (MDAC) 2.8
<b>Browser</b>	Microsoft® Internet Explorer 6 or 7
<b>Processor</b>	800-MHz Intel® Pentium® III processor (faster processor recommended)
<b>RAM</b>	512 MB
<b>Video</b>	1024 x 768 VGA with True Color
<b>Hard Disk</b>	400 MB free disk space for installation
<b>Pointing Device</b>	Mouse, trackball, or other device
<b>CD-ROM</b>	Any speed (for installation only)
<b>MS Access</b>	2003 or 2007 (Note: For details concerning Microsoft Access system requirements, consult your Microsoft documentation.)
<b>Database Version</b>	Microsoft® Access™ 2003, Microsoft® Access™ 2007, SQL Server 2000, SQL Server 2005, Oracle 10g, Oracle 11g

## 4 Installing Facility Manager

### Steps to Install

1. Follow the instructions under **Before Installing Facility Manager**.
2. Install Facility Manager from your product CD.
3. **If you are using Oracle or SQL Server**, create a DSN.
4. **If you are not using the sample database**, link the Facility Manager application to your database or create a new database.

**Note:** Facility Manager 2009 will run side-by-side with Facility Manager 7.1.

### Before Installing Facility Manager

Before installing Facility Manager, do the following:

1. **Install Shared Resources and Database** – If you are installing Facility Manager for a single user, proceed to step 2. If you are installing Facility Manager for a network of users, shared resources and database components must be installed first. See the FMDesktop Shared Resources Installation Guide for instructions on the one-time installation or update of your networked FMDesktop components.
2. **Check Hardware and Software Requirements** – Verify that your computer meets the client hardware and software requirements as outlined above. If you are using SQL Server or Oracle, assure that your ODBC driver is compliant with the version you are using.
3. **Install Microsoft Access 2003 or Higher** – Microsoft Access must be installed on the Facility Manager computer. If you do not have and do not wish to purchase a full version of Microsoft Access, a runtime version of Microsoft Access is included on the Facility Manager installation CD. See the instructions for installing Microsoft Access Runtime in Appendix A.
4. **If you have already installed and used Facility Manager with the Microsoft Access database and you now wish to install SQL Server or Oracle**, you must first uninstall the Microsoft Access version of Facility Manager. This will ensure that you are using the SQL Server or Oracle version of the Microsoft Access middleware database. Before uninstalling, make a copy of your Microsoft Access database (if you wish to save it). To uninstall Facility Manager, use the Add/Remove Programs tool on the Windows® Control Panel to remove the Facility Manager program from your computer. The listed name of the program is Facility Manager 2009 for Access/SQL/Oracle.

## Installing Facility Manager from the CD

Before attempting an installation, close any programs you have open on your computer. This includes any programs that start automatically when you turn on your computer (for example, virus scanners, task schedulers, toolbars, RealPlayer™, HotSync® Manager, and so on). Use the following steps to install the Facility Manager client on your computer.

**Important:** You must have full administrative privileges to install the Facility Manager client.

1. Close any programs you have open on your computer. (This includes any programs that start automatically when you turn on your computer, such as virus scanners, task schedulers, toolbars, RealPlayer™, HotSync® Manager).
2. Put the Facility Manager CD in your CD-ROM drive; your computer should automatically start the Facility Manager setup program and open the Installation Wizard. If not:
  - a. Click the Windows Start button in the bottom left corner of the screen.
  - b. Click Run.
  - c. Enter **D:\setup.exe** in the Open: field (where D:\ is your CD-ROM drive).
  - d. Click OK.
3. Click Read the Documentation on the Facility Manager Installation Wizard, review the available documentation to familiarize yourself with the Facility Manager application and installation requirements.
4. Click Install Products on the Facility Manager Installation Wizard, to begin the install process.
5. On the Select Products to Install screen you have the option of installing Autodesk® Design Review 2009 in addition to Facility Manager. If you wish to install Autodesk Design Review 2009 on your machine, select the Autodesk Design Review 2009 check box so that a checkmark is displayed. Click Next.
6. After reading and accepting the Facility Manager End User License Agreement, click I Accept, and then click Next.
7. It is recommended that you accept the default installation directory (C:\Program Files\FMDesktop\Facility Manager 2009). If you wish to change the default installation location for Facility Manager:
  - a. Click Configure.
  - b. Click Browse, and navigate to the location where you would like Facility Manager installed.
  - c. Click OK to save the installation path.

- d. Click Next to complete the configuration.
  - e. Click Configuration Complete to return to the main installer screen.
8. To accept the displayed settings and begin installation, click Install.
  9. When the Facility Manager installation has been completed successfully, click Finish.
  10. Proceed to **Creating a DSN**.

**Note:** You must have a Facility Manager user's license for every computer that has the Facility Manager installed on it. If you have questions about Facility Manager licensing, contact Autodesk at [support@autodesk.com](mailto:support@autodesk.com). An Autodesk Account Manager can answer any questions you may have.



## Creating a System DSN (Data Source Name)

If you are using a SQL Server or Oracle database, you must create a DSN on your workstation to connect to the remote database. Example instructions for creating a DSN can be found in **Create an Oracle DSN** or **Create a SQL Server DSN** in the FMDesktop Shared Resources Installation Guide. After creating your DSN, proceed to **Starting Facility Manager**.

## Starting Facility Manager

After successfully installing Facility Manager, click the Windows® Start button. Select **Programs>FMDesktop>Facility Manager 2009> Facility Manager 2009 for Access/SQL/Oracle**. This opens the Facility Manager program.

You can also double-click the Facility Manager shortcut on your desktop.

If you are prompted with a macro security warning, follow the instructions in **Appendix B – Setting MS Access Macro Security to Work with Facility Manager**.

Proceed to **Linking to a Data Source**.

## Linking to a Data Source


You can link Facility Manager to the FMDesktop database and the Facility Manager resource folders using the controls on the Data Link form.

In a single user environment, the first time Facility Manager opens, it is linked to a sample FMDesktop database file and Facility Manager resource folders located in the default Facility Manager program folder (C:\Program Files\FMDesktop\Facility Manager 2009\Sample Data\FMData.mdb). Depending on where you installed the resource files, you may need to change this link.

In a network environment, you must link the Facility Manager application on every computer to the shared FMDesktop database file and Facility Manager resource folders located on a network drive or server. See **Linking to an Existing Data Source** for instructions.

## Linking to a New Data Source

To create a new FMDesktop database file and Facility Manager resource folders on your local or network drive and link to these files, use the controls on the Facility Manager Data Link form. These shared resources are automatically created the first time you use the Data Link form.

1. Open Facility Manager.
2. If the Organization form is displayed, close it. The Facility Manager Menu is displayed.
3. On the Facility Manager Main Menu, click Data Link, which is located on the top edge of the Menu.
4. Click the New Blank Data Source button on the upper-left corner of the form. 
5. Browse to the location where you want to create the data source.
6. For File name, enter the name you want to be displayed for the new data source, and click Save.


A new data source is created and added to the Select Database list on the Data Link form.

7. To link to the new data source, select the data source record on the Select Database list, and click Link.
8. Close the Data Link form, and begin using the program.

## Linking to an Existing Data Source

**Important:** If you are upgrading from a previous version of Facility Manager you should first make a backup copy of your facility data (e.g. FMData.mdb if you are using Microsoft Access) before linking Facility Manager to the data source.

To locate an existing FMDesktop database file and Facility Manager resource folders on your local or network drive and link to these files, use the controls on the Facility Manager Data Link form.

1. Open Facility Manager.
2. If the Organization form is displayed, close it, and the Facility Manager Menu is displayed.
3. On the Facility Manager Main Menu, click Data Link, which is located on the top edge of the Menu.
4. On the Data Link form, click the Find Data Source button. 
5. In the Select Data Source Location dialog, browse to the location of the data source, and click Open.
6. If the selected data source is an older version, you are prompted to update the selected data source:
  - Click Yes to update the selected data source.
  - Click No to cancel the linking process.
7. If you choose, you may edit the default name of the selected data source by editing the value displayed in the Name field on the Data Link form.
8. To link to the data source, select the data source record on the Select Database list, and click Link.
9. Close the Data Link form and begin using the program.

**Note:** If you receive ODBC errors and are using a SQL Server or Oracle database, and if you used a DSN other than the one specified in the FMDesktop Shared Resources Installation Guide, follow the instructions in the “Link Microsoft Access to SQL Server or Oracle” section of the FMDesktop Shared Resources Installation Guide to correct the problem. You must follow these instructions any time you create a new database in the Facility Manager application before a connection can be made.

## 5 Uninstalling Facility Manager

Use the Add/Remove Programs tool on the Windows® Control Panel to remove the Facility Manager program from your computer. The listed name of the program is Facility Manager 2009 for Access/SQL/Oracle.

## 6 Troubleshooting

If you encounter unexplained problems while installing and running Facility Manager, review these suggestions before contacting Autodesk Customer Support.

### ***Facility Manager Fails to Open***

If Facility Manager fails to open, uninstall it and reinstall it as documented in the sections titled, **Uninstalling Facility Manager** and **Installing Facility Manager from the CD**.

### ***Can't Access Data***

Is Facility Manager still linked to your data? Network problems can sometimes break the link between the computer running Facility Manager and a server storing data. Contact your Network Administrator if you think that this may be the problem.

### ***Can't See Entire Form on My Computer Screen***

Because of the detail and size of the screens in the Facility Manager programs, we recommend that the monitor resolution on a computer running a Facility Manager program be set at a minimum of 1024 x 768 pixels. Resizing your monitor resolution will increase the amount of information that appears on your screen. Your monitor and display adapter determine whether you can change this setting.

### ***Colors on the Drawing Form Are Flashing***

Flashing colors could be caused by a low color setting on your monitor. If your monitor is set to display 256 colors, try increasing it to the next higher setting. Your monitor and display adapter determine whether you can change this setting.

### ***Selected On-Line Reports Are Not Displayed***

On-Line reports in Facility Manager are saved as Microsoft Snapshot files. You need to install a printer driver on your computer in order to view these files.

### ***Microsoft Access Files (msaccess.exe) cannot be found***

Upon opening Facility Manager using the program shortcut, a message is returned that the Microsoft Access files (msaccess.exe) cannot be found. To fix this problem, first verify that you have installed Facility Manager on a supported system. Microsoft Windows<sup>®</sup> 95 and 98 operating systems can cause this problem. Also, Microsoft Access versions older than 2003 can result in this problem.

If you are installing on a supported platform, Microsoft Access 2007 Runtime can be installed using the instructions in **Installing Microsoft Access Runtime**.

### ***Upon Database Link, ODBC Errors are reported***

If you are using a DSN other than FMDDataOracle or FMDDataSQL, follow the instructions in the "Link Microsoft Access to SQL Server or Oracle" section of the FMDesktop Shared Resources Installation Guide every time a new database is created in the Facility Manager application.

## Appendix A - Installing Microsoft Access Runtime

If you do not have a Microsoft Access license, you can install the Microsoft Access Runtime included on the Facility Manager installation CD.

Before attempting any installation, close any programs you have open on your computer. This includes any programs that start automatically when you turn on your computer (for example, virus scanners, task schedulers, toolbars, RealPlayer™, HotSync® Manager, and so on). To install the Facility Manager client on your computer, complete the following steps:

1. Place the Facility Manager CD in the CD-ROM drive of your computer if installing for a single user or of the server if installing for a network of users. Your computer should automatically start the Facility Manager setup program and open the Install Wizard.
2. Close the Facility Manager Install Wizard.
3. Open Windows Explorer and navigate to the **Runtime** folder located on the Facility Manager installation CD.
4. Double-Click **Setup.exe** and follow the on-screen instructions to install MS Access Runtime.

## Appendix B - Setting Microsoft Access Macro Security to Work with Facility Manager

Facility Manager uses advanced macros to perform its functions. MS Access macro security must be adjusted to "Low" to allow these macros to run.

### Using a Full Version of MS Access

If you are running a full version of MS Access 2003 or higher, there are two methods of adjusting macro security levels. These methods are Automatic Configuration and Manual Configuration. The method you use will depend upon your profile and network configurations as described below.

#### Automatic Configuration

Facility Manager includes code to check your macro security settings and walk you through the process of setting the appropriate security levels automatically. The following instructions will walk you through the typical prompts and responses that will automatically configure your macro security settings.

1. When you first start Facility Manager 2009, if you are not prompted with a macro security warning, your settings are adequate for Facility Manager, and you can skip this section. If you are prompted with a macro security warning, click **No**.
2. A second message will be displayed, prompting you to open the file. Click **Open**.
3. A message is displayed prompting you to change your security settings. Click **Yes**.
4. A message is displayed prompting you to restart Facility Manager. Click **OK**.
5. Close and restart Facility Manager.

#### Manual Configuration

While Facility Manager includes code to check your macro security settings and walk you through the process of setting the appropriate security levels, there may be Windows profile and other settings that can prevent even this code from running correctly. The following will guide you through the process of manually adjusting your macro security settings to allow Facility Manager to run properly in a full version of MS Access 2003 or higher.

To manually set your MS Access security settings to "Low", do the following:

For Access 2003:

1. Open MS Access 2003 from your Windows Start menu.
2. On the MS Access menu, select **Tools > Macro > Security**.
3. The MS Access Macro Security dialog is displayed.
4. On the Security dialog click the **Low** option and click **OK**.
5. A message is displayed prompting you to restart MS Access for changes to take effect. Click **OK**.

6. Close MS Access.

For Access 2007:

1. Open MS Access 2007 from your Windows Start menu.
2. Click the Office button.
3. Click the Access Options button > Trust Center > Trust Center Settings button > Macro Settings > Enable All Macros.

Your MS Access macro security settings will be set to Low. The next time you open Facility Manager 2009, no security prompts should be displayed and the application will function as expected.

## MS Access Runtime

The following steps walk you through the process of setting MS Access macro security to Low in the runtime environment:

1. When you first start Facility Manager 2009, if you are prompted with a macro security warning, Click **Yes**.
2. If you are prompted with a message to restart Facility Manager, click **OK** to close Facility Manager, then restart the Facility Manager application. If you are not prompted with this message, go to the next step.
3. A message is displayed prompting you to allow MS Access to open the Facility Manager application. Click **Open**.
4. A message is displayed prompting you to change your security settings. Click **Yes**.
5. A message is displayed prompting you to restart Facility Manager. Click **OK**.
6. Close and restart Facility Manager.