READ ME FIRST SYSTEM NOTES

1. **The file you are currently reading**, *SpsInstallationReadMeFirst.pdf*, contains both installation and administrative information and **should be read in its entirety before proceeding with application installation.**

2. **All communication with SysPricer Corporation**, hereinafter referred to as the *Corporation*, including obtaining Product activation keys, **needs to be accomplished via Email at support@syspricer.com**.

3. In an Email requesting a Product activation key, the User needs to provide the following information:

   - Company/Corporation Name & Address
   - Point-of-Contact:
     - Name
     - Telephone Number
     - Email Address
   - Whether request is for a Trial or a Fully Licensed Product activation key
     - A Fully Licensed Product activation key requires pre-payment to the distributor.

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SECTIONS

A. **Installing and Activating the Products**

   1. Sps related files are installed on the user's computer by running an executable *setup* file (e.g., *Setup_SpsPBLB.exe*) that can be downloaded from the

Corporation's web site (*www.syspricer.com*). Executing the subject *setup* file overwrites any Sps application files that have already been installed on the user's computer, including proof of a valid activation. **The subject *setup* file needs to be, and should be, run only once on any given computer.** Any future updates to Sps system files will be accomplished by the user downloading the updated files from the *syspricer.com* web site and replacing the corresponding existing files with them.

a. Before executing the application's *setup* file, if the Sps application you plan to install (i.e., either Sps Proposal Builder Large Business or Sps Proposal Builder Small Business) **already resides on your computer as an activated application, you must Deactivate it and obtain a Deactivation Key as proof of Deactivation,** as explained in Section H. *Sps Proposal Builder Deactivation and Reactivation* below**.** If you have any questions about this subject, contact the *Corporation* before proceeding.

b. If you plan to install the MS Access *Runtime* version, an installation error can occur, if you try to install it and a version of it is already installed on your computer. **An existing MS Access *Runtime* application must be uninstalled before it can be re-installed successfully.** Removal of the installed *Runtime* version is accomplished by using the *Add/Remove Programs* routine that is part of the MS Windows Operating System. The exact sequence depends on the MS Windows version installed on your computer. You can download MS Access *Runtime* directly from Microsoft, as follows:

> MS Access 2016 Runtime:

> URL: https://www.microsoft.com/en-us/download/details.aspx?id=50040

c. During the installation process, shortcuts to run the Sps Proposal Builder can be added automatically to your computer's Start Menu and Desktop. If not added during the installation process, you can use standard MS Windows conventions to add them later.

d. Relevant MS Access version information, as regards Sps requirements, is provided in the ***Microsoft Access and Microsoft Excel Version Notes*** section below. If a *Full/non-Runtime* version of MS Access is installed on your computer, and you're unsure of its version, you can verify it using *MS Access Main Menu Bar → File → Account → About Access* to display the version.

e. Both the Proposal Validation Model and Proposal Analyzer use Macros that must be enabled for them to work properly. See the ***MS Excel Macro Security Considerations*** section below for guidance on how to handle Macro security issues.

2. After *Corporation* products have been installed on a user's computer, they must be activated.

   a. The System generates and displays a unique Control Number for the Proposal Builder Large Business and Proposal Builder Small Business the first time each is run. Each Control Number has an Activation Key tailored specifically to it. The Proposal Builder Data Entry Utility doesn't use an Activation Key.

   b. Record the applicable Control Number and contact the *Corporation* using one of the following contact methods to obtain the corresponding Activation Key:

      (1) Email: support@syspricer.com

      (2) Telephone: N/A

      See the ***Product Support*** section below for information about the *Corporation*'s Product Support policy.

   c. After obtaining the appropriate Activation Key, the System Administrator needs to record it for use in completing the activation process. The **Activation Key** for the Proposal Builder **SHOULD BE RETAINED INDEFINITELY**, since it's needed to deactivate a Sps Proposal Builder application before it can be reactivated on another computer.

   d. A dialog box showing the Control Number and requesting user entry of the Activation Key will be displayed each time a Proposal Builder application is run, until the user supplies the valid Activation Key.

      (1) If the Trial version of the Proposal Builder is being used, a dialog box showing the number of days and runs remaining during the trial period will be displayed each time the Proposal Builder application is run. The user is afforded the opportunity to enter the Activation Key for the licensed version, if it's available. This dialog box continues to be displayed until either the licensed version of the product is activated or the trial period expires.

3. After the Proposal Builder has been activated, for each installation, the System Administrator can control individual user access to the various System menu items (i.e., operations) using *PropOpen → UserAccess* on the Proposal Builder's Main Menu. Disabling selected operations and setting the UserAccess password can be used to control the proposal preparation process in a multi-user environment.

B. System Components

1. The System consists of four separate components, a Proposal Builder Large Business, Proposal Builder Small Business, Proposal Builder Data Entry Utility

and Proposal Analyzer. The Proposal Builder Data Entry Utility works only with proposals created and maintained by the Proposal Builder Large Business and Proposal Builder Small Business, and is limited to data entry into a Sps structured proposal. Both Proposal Builders prepare files that are fully compliant with the applicable ANSI standards for a contract pricing proposal. The Proposal Builder Large Business will handle the largest and most complex cost proposals, while the Proposal Builder Small Business provides an affordable alternative suitable for small business. The Proposal Builders and Proposal Analyzer address different aspects of the proposal process and run independently of each other. However, the Proposal Builder Large Business or Proposal Builder Small Business is needed to create the Excel Workbooks that the Proposal Analyzer uses as its data source. All Sps components are licensed, not sold. The Proposal Builder Large Business and Proposal Builder Small Business are licensed separately and the license for each grants the buyer the right to install and use one copy of the subject component on a single computer. In addition, the license for both Proposal Builders includes the right for the buyer to install, use and distribute unlimited copies of the separate, ancillary Proposal Builder Data Entry Utility designed to be used in conjunction with them. The Proposal Analyzer is an ancillary utility that uses Excel Workbooks generated by the Sps Proposal Builders as its data source and is distributed with them.

2. The System has been designed to take advantage of the powerful features inherent in Microsoft Access and Microsoft Excel, both of which are part of the Microsoft Office Suite.

   a. The Proposal Builder Large Business, Proposal Builder Small Business and Proposal Builder Data Entry Utility require that MS Access, either the full or runtime version, be installed on the user's computer. The full version must be purchased separately, if not already purchased for general use. The full version provides the user full use of the MS Access application (i.e., it can be used for purposes other than with the System's Proposal Builder applications). All Proposal Builder operations can be accomplished using either version. The full version offers significant, potential advantages to experienced Sps users who regularly work with very large proposals. It can be used to develop custom interfaces that provide seamless integration of Sps and other existing, and future, user cost estimating and cost management systems. The full version also allows the user to access proposal data tables directly without recourse to the Sps user interface. This provides an opportunity to make bulk data changes much faster than by using the Sps User interface, but, on the down side, increases the possibility of entering invalid data by circumventing certain data validation processes built into Sps data entry forms.

b. Both the Proposal Builder Large Business and Proposal Builder Small Business can generate an MS Excel Workbook that can be used for proposal validation purposes. Sps uses the MS Excel *xlsm* file type (XML Macro-Enabled), introduced in MS Office 2007, as its default file type. The MS Excel Workbook generated by the Proposal Builders can also be used for real-time sensitivity analysis and as the data source for the Proposal Analyzer.

(1) There is no runtime version of MS Excel that is suitable for Sps purposes. It must be purchased separately, if not already installed on the user's computer for general use.

3. The Proposal Builder Large Business will handle the largest and most complex cost proposals, while the Proposal Builder Small Business provides an affordable alternative suitable for small business. The Sps Proposal Builder Small Business (PBSB) includes all of the operational capabilities of the Sps Proposal Builder Large Business (PBLB), except for the following differences:

- The Cost Element table for PBSB, accessed using Menu sequence *BuildStructure → Element*, is limited to 160 table records. Depending on an entity's individual estimating system characteristics, 160 table records will translate into a *Summary* worksheet of 75-85 separate cost elements. An Excel workbook is available that shows an example of how 160 table records were used to build a Workbook that handles 84 separate cost elements, a number that should accommodate the vast majority of proposals prepared by small businesses. The subject workbook example can be opened and viewed via www.*syspricer.com* Website Link *Sps PBSB Maximum Cost Element Example*.

- The WBS table for PBSB, accessed using Menu sequence *BuildStructure → WBS*, is limited to 125 table records.

- The SOW table for PBSB, accessed using Menu sequence *BuildStructure → SOW*, is limited to 65 table records.

C. Getting Started

1. Both the Proposal Builder and the Proposal Analyzer are designed to be easy to use. Learning to use them is aided by the fact that most operations are intuitive. Also, Help for every System operation is available via custom System Help.

2. The new user is advised to begin by reviewing the topics under the *Contents* Tab of System Help.

a. System Help for the Proposal Builder is activated by selecting Menu Item *Help* from the application's main menu bar and then selecting *Help System Overview* from the drop-down list.

b. System Help for the Proposal Analyzer is activated by selecting custom Menu Item *Sps Menu Items → AppHelp* from the application's main menu bar and then selecting *Help System Overview* from the drop-down list.

3. Topic *By the Numbers* in Book *Using the System* (under the *Contents* Tab of System Help for both the Proposal Builder and the Proposal Analyzer) provides hands-on experience using the System. For many users, these exercises will be all that's needed to prepare them to use the System for actual proposal preparation and analysis.

4. The System is distributed with several sample proposals. Their purpose is to provide the user with a hands-on method to become familiar with various System operations. File *Sps Sample Proposal Notes.pdf* provides guidance on using these sample proposals to help understand proposal cost logic structure definition, a process the user may not find intuitive, but one that can be readily learned with a little practice.

D. Microsoft Access and Microsoft Excel Version Notes

1. The *Corporation*'s Systems Pricing System (Sps) requires that both Microsoft Access and Microsoft Excel be installed on the user's computer to take full advantage of the System. A System generated ANSI compliant text file can be created using MS Access alone and a System generated Validation Workbook can be used by MS Excel alone, but using both applications together provides the user with more real-time functionality and flexibility.

2. All Sps Proposal Builder applications have been created and compiled using MS Access 2016, and MS Access 2016 (or higher) is required to run them. All Sps Proposal Builder applications run the same on the MS Access 2016 *Full* Version and the MS Access 2016 *Runtime* Version.

3. The System uses MS Excel to generate and view Validation Workbooks and to run the Sps Proposal Analyzer. MS Excel 2016 was used to create MS Excel related Workbooks and code, and this version (or higher) is the recommended version for Sps.

E. MS Excel Macro Security Considerations

1. The System's Validation Models that are generated by its Proposal Builders and its Proposal Analyzer are MS Excel Workbooks, so Macro Security issues need to be considered. After opening MS Excel 2016, for the Validation Model Workbooks and for the Proposal Analyzer Workbook, Macro-related security issues can be resolved by designating the folder(s) where the subject files reside as *Trusted Locations* using the following sequence:

Menu Bar *File [Tab] → Options → Trust Center → Trust Center Settings... → Trusted Locations → Add new location... → [Add applicable folders/subfolders and Save]*

2. Neither the System's Proposal Analyzer nor its Validation Models support digital signatures.

F. Operational Considerations

1. During certain Sps Proposal Builder operations (e.g., Validation Model creation and *Import → Data*), the message *Systems Pricing System (Not Responding)* may appear on the title bar at the top of the display. A similar *(Microsoft Excel - [Workbook Name] Not Responding)* message may also appear while using an MS Excel Workbook created by Sps as a validation model. This message is generated automatically by the MS Windows operating system, when a program fails to acknowledge a request from it within an expected timeframe. This message **DOES NOT** necessarily indicate that the application has stopped working or that it has malfunctioned. It clears automatically, when MS Windows receives the expected response from the application. Because display of the subject message is a function of proposal size and complexity, CPU speed and other hardware characteristics, and the number and type of other processes running on the user's computer, it's impossible to predict if, or when, it may appear. Since it's unlikely that the subject message indicates an actual Sps software malfunction, you are advised to wait until it clears automatically. During testing by the developer on very large and complex proposals, when the message appeared, it usually took less than a minute to clear automatically. If you should experience unacceptably long delays associated with the subject message, closing other non-essential processes running on your computer may help to resolve the problem. Relief may also be gained by changing the Sps application's process priority by using the MS Windows Task Manager. You could also try running the application on a faster computer.

2. As noted above, Sps uses the MS Excel *xlsm* file type (XML Macro-Enabled), introduced in MS Office 2007, as its default file type. The subject file type has the following Worksheet capacities:

● *xlsm* (MS Excel 2007 and later): 1,048,576 rows by 16,384 columns

Using the *xlsm* file type ensures that no proposal will exceed Worksheet limits.

G. Upgrading from MS Access Runtime to MS Access Full Version

If after installing the *Runtime* version of MS Access, you subsequently upgrade to the Full version, you can run the Sps Proposal Builder application (with its *accde* file

extension) with no further action needed. You **DO NOT** have to reinstall the Sps product.

H. Sps Proposal Builder Deactivation and Reactivation

1. The Software License agreements for the Proposal Builder Large Business and Proposal Builder Small Business allow each application to be used on a single computer at any given time, so an application must be deactivated on one computer before it can be reinstalled, activated and used on another computer. After the application has been deactivated, it cannot be used until reinstalled and reactivated, so be sure of your intention before proceeding with the deactivation process. A Deactivation Key, and associated Control Number, is displayed during the deactivation process for each application. Be sure to record both the Deactivation Key and Control Number, as both are needed as proof of product deactivation.

2. The sequence of events for a typical product deactivation and reactivation is outlined, as follows:

   a. Deactivate the application using the appropriate application menu item.

   b. Record the Control Number and Deactivation Key displayed by the application during the deactivation process.

   c. **CHECK TO ENSURE YOU HAVE CORRECTLY RECORDED THE CONTROL NUMBER AND DEACTIVATION KEY DISPLAYED DURING THE DEACTIVATION PROCESS. BOTH ARE NEEDED AS PROOF OF DEACTIVATION AND TO REINSTALL THE PRODUCT IN ACCORDANCE WITH THE TERMS OF THE PRODUCT'S LICENSE AGREEMENT.**

   d. Uninstall the application using the MS Windows Control Panel or, alternatively, delete the folder where the application resides.

   e. Reinstall the application using the application *setup* file.

   f. Record the Control Number displayed during the application installation process.

   g. Contact the application distributor:

      (1) Provide the Deactivation Key and Control Number for the deactivated application, as proof of product deactivation.

      (2) Provide the Control Number for the newly installed application and obtain its Activation Key from the distributor.

   f. Activate the newly installed application.

3. Both the Proposal Builder Large Business and Proposal Builder Small Business **include safeguards that allow the System Administrator to protect against unintended deactivation.** The Proposal Builder is installed with the *DeActivate* Menu Item disabled. The System Administrator can prevent a user from enabling the subject menu item by assigning a password to *UserAccess* operations using the following menu item sequence:

[Main Menu] → PropOpen →UserAccess → Password → Set

I. Copyright and Licensing Notes

1. *SysPricer* is a trademark of the *Corporation*. The *Proposal Builders Large Business*, *Small Business*, *Data Entry Utility* and *Proposal Analyzer* are *Corporation* software products that together comprise the *Corporation*'s *Systems Pricing System* (Sps). Copyright 2009-2024 SysPricer. All rights reserved.

2. *Microsoft* and *Windows, Access and Excel* are either registered trademarks or trademarks of Microsoft Corporation. Microsoft software needed to run the *Corporation's* software products is distributed under license from Microsoft. Copyright 1992-2024 Microsoft. All rights reserved.

3. License Agreement

   a. The *Corporation*'s Software License Agreements, and the opportunity to either accept or decline the terms, are displayed during product installation and activation. After successful product activation, they are viewable using Menu sequence *Help → About Sps → Display License Agreement* Button. The user must accept the terms of the associated License Agreement before each product can be activated.

   b. Activating the Software Product constitutes user acceptance of the License terms.

J. Product Support

1. The following Product Support is included as part of product purchase:

   a. The *Corporation* will take action to correct any deficiencies identified in the software that have a material effect upon product performance.

   b. The *Corporation* will respond to questions about product usage as soon as possible, in the order in which the questions are received.

   c. The *Corporation* will answer procedural questions about how to build Proposal Builder Logic Tables, but will not build them as part of Product Support.

2. Contact Points are as follows:

    a. Email: support@syspricer.com

    b. USPS Mail: SysPricer Corporation
                      6 Technology Drive, Unit 221
                      Chelmsford, MA 01863

3. Consulting and training services are available at additional charge, as agreed-to between the *Corporation* and individual users of the product.