Box Theory^{TM} eCourse and Software Installation Instructions/Activation Key

I recommend you read the following instructions before installing your **Box Theory^{TM} Software and eCourse**.

1. **System requirements for running the software include an Internet connection and Microsoft Windows.** For creating "component documents" within your company database file, Box Theory™ Software currently supports Microsoft Word, Excel, PowerPoint, Publisher, and similar Open Office products.

   Note: Box Theory™ Software also requires the .NET Framework and the Microsoft Visual C++ Redistributable Package. These standard programs are probably on your computer already (part of Windows installation). If not, you will receive a message giving you the web link where you can download them for free. Follow the simple installation guidelines.

2. **From Google Drive,** download the "Box Theory Software and Content" file to your computer's "Downloads" folder and right-click to "Extract All." For easy access, copy all Content files (numbers 3-5h) to a conveniently located "Box Theory" folder**.** Select or double-click on the BoxTheorySoftwareInstall application file. It is recommended that you use the default settings of the install program. A Box Theory™ Software icon will be put on your desktop.

3. *****Before proceeding with the installation, you may want to temporarily disable your virus protection software.** If your settings are too strict, the installation could fail, and you will get an error message. If any other security messages appear, go ahead and "Allow" or "Run anyway."

   Because virus definitions are always changing, you may need to add an "exclusion" or "exception" to Box Theory™ files within your virus protection software. This is easily done by temporarily disabling your antivirus software and telling it *not to scan* the folder that contains Box Theory™ installation/program files. If you use the installation default, the path to those files is:

   C:\Program Files (x86)\Carroll and Company\Box Theory Software

   Copy this path into the "exclusion" or "exception" area of your antivirus software. If you install the files in a different location, you will have to use the different path.

   Summary: If you have any problem with the first attempt to install Box Theory™ Software, temporarily disable your antivirus software, add the one-line exclusion path above, install the software as normal, and re-enable your antivirus software.

4. **Use the following activation keys:**

   BoxTheoryeCourse.exe **(ebook password: $ystems101; dollar sign for the "S")** BoxTheorySoftwareInstall.exe **(activation key for the Multi-Company version of the software: BTGMC2020)**

5. Upon entering the software for the first time, you will be asked to type your company name, personal name, and job title. I suggest you limit the company name to 25 characters. Use a short or abbreviated version of your company name if it is longer. You can also modify the name later from within the software.

6. If you have any questions or problems, contact BoxTheoryGold@gmail.com.

Special Installation Issues and Options

Re-Install Software on Same Computer

Occasionally, a person needs to re-install the Box Theory™ software and continue with their existing company database. Below are instructions for this procedure.

1. Use the Box Theory™ or Windows uninstall program to uninstall your current Box Theory™ software. (Your existing company database file will not be deleted.)

2. When the software loads, enter your activation key: **BTGMC2020**

3. When the software asks for your name/company name, click on **"Cancel."** This will open a Windows directory tree. Go to "My Documents," or wherever you put your company file, and look for a folder with your company name followed by (BTG). Go into this folder (e.g., YOURCOMPANYNANE (BTG).

4. Find your company ".btg" file and double-click to open it. This will load your existing company database into the software. It will also remember this location in the future and open automatically.

Re-Install Software on Different Computer and Move Your Company Database

If you intend to re-install Box Theory™ Software on a new or different computer and need to move your company database to that computer, use the following procedure.

1. Email or transfer your company .btg file to the new computer. It is located in the "Documents" or "My Documents" folder in a directory with your company name followed by (BTG). Place the file in the "Documents" or "My Documents" folder of your new computer.

2. Double-click the "BoxTheorySoftwareInstall.exe file in your "Downloads" folder to begin the installation.

3. After the software loads, enter the activation key**: BTGMC2020**.

4. When the software asks for your name/company name, click on **"Cancel."** This will open a Windows directory tree. Go to "My Documents," or wherever you put the company .btg file you transferred from the old computer. Select to open your company file.

5. You will see a red **"Restore"** button at the top of the software home page screen. Click to restore your company database to the newly installed software.

6. The software will automatically replicate the folder *and contents* you had on the old computer with the company name followed by (BTG). This will include all the component documents you have created. You're set to go.

Other Installation Issues and Possibilities

1. The Box Theory™ database file can only be opened by one user at a time. It is recommended that one or two designated people become experts with the software. <u>Note:</u> To prevent problems of overwriting data, the database is locked to others when one user has the software open. Simple scheduling will allow more than one person to work on the same database.

   While it is encouraged for *team members* to collaborate when "roughing in" a system flowchart using a whiteboard, a person who is familiar with Box Theory™ Software will be the most efficient at developing and refining the final system documents.

2. If you have more than one person working in Box Theory™ Software, I recommend that the software be installed on a fileserver or in a peer-to-peer networking arrangement where both people have access to the same database file. Multiple client/computer installations can point to one company database. With the proper setup, you can also access Box Theory™ software on your business fileserver from your home computer.

3. It is also possible to have separate installations on different computers—each having its own company database. Some people have successfully installed to a thumb drive and moved the company database between multiple computers. *Be sure the thumb drive is present before the software is launched and not removed until the software is closed. This enables the software to keep track of its location.* (You may even be able to install and share the company database file on Dropbox, but this is untested.)

4. If someone other than the business owner does most of the work in Box Theory™ Software, they can periodically email the owner an updated version of the .btg file. When going back and forth, be sure that the <u>*most updated .btg file*</u> is emailed and copied over the older one.

5. Upon completion of a single system, a person could also export and email a System/box (.box file) with all of its components (e.g. flowchart, checklist, documents, measurement reports) to another person for importing into their database. All or selected parts of the Organization Blueprint (except the System Framework) can also be exported and imported between databases (.blu file).

These are various ways you can work with a single company .btg file, or keep two separate files synchronized.

See Related "Software Tips":

Exporting/Importing a System/box
Box Theory™ Software Underlying File Structure
Saving, Backing Up and Restoring Your Company Database