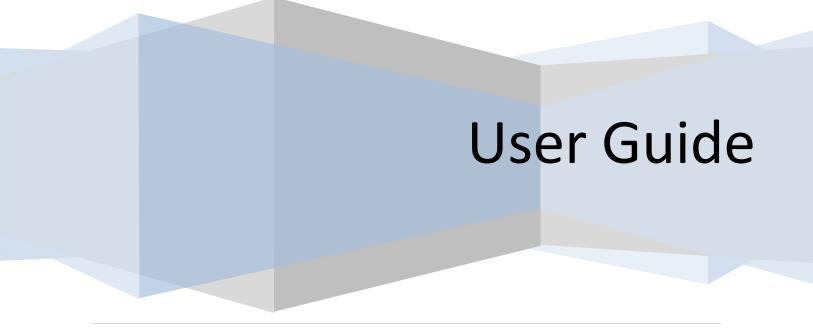
Balance Point Technologies, Inc. www.maxtoolkit.com

# **MAX Workbench**



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#### Purpose

MAX Workbench will manage the authorization configuration of applications developed by Balance Point on Company or User/Company levels. It will provide the users with ability to create their own work environment and those who are desegnated as managers will be able to configure or modify work environments for the regular users.

### **Minimum System Requirements**

- .NET Framework 4.5
- EXACT MAX Software v5
- SQL Server 2008
- Internet connection

### Installation

- MAX Workbench can be installed on a user workstation or on a server as long as the Exact MAX Client is installed on the same system. Also, all of the system requirements mentioned above must be met in order for MAX Workbench to function properly.
- Run MAXWorkbenchInstaller.msi



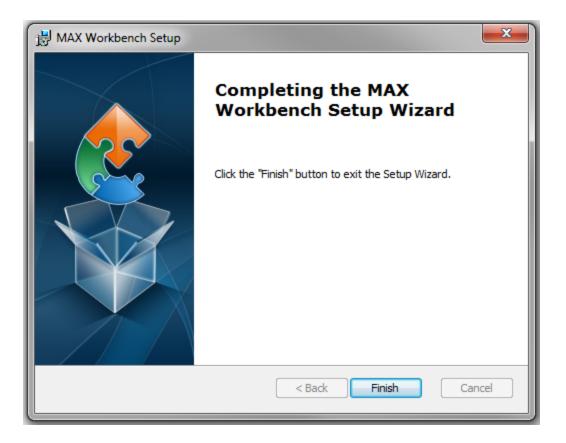
- Click Next
- Select the Installation Folder and click Next

| B MAX Workbench Setup  |                |
|--|----------------|
| Select Installation Folder<br>This is the folder where MAX Workbench will be installed.          |                |
| To install in this folder, click "Next". To install to a different folder, enter it<br>"Browse". | below or click |
| Eolder:<br>C:\Program Files (x86)\Balance Point Technologies\MAX Workbench\                      | Browse         |
|  |                |
| Advanced Installer   | Cancel         |

Click Install

| B MAX Workbench Setup  | ×      |
|--|--------|
| Ready to Install<br>The Setup Wizard is ready to begin the MAX Workbench installation  |        |
| Click "Install" to begin the installation. If you want to review or change any of yo installation settings, click "Back". Click "Cancel" to exit the wizard. | ur     |
| Advanced Installer   | Cancel |

• Click Finish



 Shortcuts will be placed on the Desktop and in the Start Manu under Programs - > Balance Point Technologies - > MAX Workbench

### **Settings Configuration**

- Launch MAX Workbench
- The Software License Agreement window will be displayed when MAX Workbench is started for the first time or if the agreement has not been accepted. Check 'I accept this license agreement' check box and Click Continue.

| This license agreement must be accepted before using MAX Workbench.  |   |
|--|---|
| Balance Point Technologies, Inc.<br>Software License Agreement   | ^ |
| BY INSTALLING, COPYING, OR OTHERWISE USING THIS PROGRAM, YOU ACKNOWLEDGE THAT YOU HAVE<br>READ THIS AGREEMENT, UNDERSTAND IT AND AGREE TO BE BOUND BY ITS TERMS AND CONDITIONS.<br>YOU FURTHER AGREE THAT IT IS THE COMPLETE AND EXCLUSIVE STATEMENT OF THE AGREEMENT<br>BETWEEN US WHICH SUPERSEDES ANY PROPOSAL OR PRIOR AGREEMENT, ORAL OR WRITTEN, AND   |   |
| ANY OTHER COMMUNICATIONS BETWEEN US RELATING TO THE SUBJECT MATTER OF THIS AGREEMENT.<br>This License Agreement is a legal agreement between you (either an individual or a single business entity)<br>and Balance Point Technologies, Inc. Use of this program and related material (collectively referred to as<br>"program") by installing, copying, or otherwise using indicates your acceptance of these terms and<br>conditions. If you do not agree to these terms and conditions, do not install or use the program. |   |
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| You may not:   | Y |
| ✓ I accept this license agreement Close  |   |
| Copyright (c) 2017 Balance Point Technologies, Inc.  |   |

• Click the Setup button on the Authentication window

| Login Credenti        |                    | -     |      |
|-----------------------|--------------------|-------|------|
| Company:              |                    | ~     |      |
| Database:             |                    |       |      |
| Authentication:       | MAX Authentication | ~     |      |
| User:                 |                    |       |      |
| Password:             |                    |       |      |
|                       | 17                 |       |      |
|                       | Remember password  |       |      |
| me configuration sett | ings are missing!  |       |      |
| me configuration sett |                    |       |      |
| me configuration sett | ings are missing!  |       |      |
| me configuration sett | ings are missing!  |       |      |
| me configuration sett | ings are missing!  |       |      |
| me configuration sett | ings are missing!  | Enter | Exit |

- SQL Settings
  - The EXACTMAX database must be present on the SQL Server that MAX Workbench will be connected to.
  - The User that will be specified in the window below must have the 'sysadmin' and 'public' roles assigned. This will be the User Account that MAX Workbench will use to connect to the specified SQL Server and perform any necessary actions.

|          |  |              | Download more from MAXToolKit |
|----------|--|--------------|-------------------------------|
| Settings |  | SQL          |                               |
|          | Server:<br>Authentication: SQL Server Authentication ~<br>User:  |              |                               |
|          | Password:  |              |                               |
|          |  | Exact MAX    |                               |
|          | License Path: Client Path:   |              |                               |
|          | Site:<br>Key:  | Registration |                               |
|          |  | Other        |                               |
|          | Notify when not all registered applications are installed Use native method for loading company users Create Login Log V Show dialog with available updates at startup |              |                               |
|          | Download Mode: Passive ~   |              | Close                         |

• Specify SQL Server Name, Authentication Type, User, Password and click Connect

| Settings |  |   | SQL  |
|----------|--|---|--|
|          | Server:<br>Authentication:<br>User:<br>Password: | HAWKEYE SQL Server Authentication sa ******** | Connected to:<br>Server - HAWKEYE<br>Database - EXACTMAX |
|          |  | Connect                                       |  |

• Specify the Client and License Paths Of Exact MAX

|               | Exact MAX             |  |
|---------------|-----------------------|--|
| License Path: | C:\Exact\RMServer\Lic |  |
| Client Path:  | C:\Exact\RMCLIENT\EFW |  |

• Specify the registration Site and Key

|       | Registration |
|-------|--------------|
| Site: |              |
| Key:  |              |
|       |              |

#### • Configure other options as needed

| Notify when not all registered applications are installed |  |
|---|--|
| ☑ Use native method for loading company users             |  |
| Create Login Log  |  |
| Show dialog with available updates at startup             |  |
| Download Mode: Passive ~                                  |  |

- If 'Notify when not all registered applications are installed' option is checked, at initial user login, the Workbench will display a list of registered applications that are not installed.

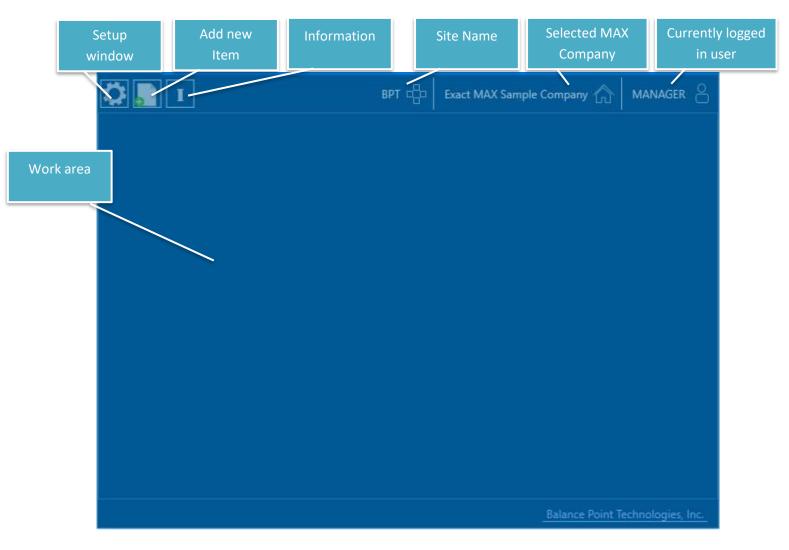
Other

- If 'Use native method for loading company users' option is checked, MAX Workbench will use MAX dll files to load a list of company users. This feature causes problems and stalls the launch of MAX Workbench after initial user login. Unchecking this option will allow MAX Workbench to manually query the list of company users directly from the database.
- If 'Create Login Log' option is checked, MAX Workbench will record the entire loin process step by step in a log file which will be located in C:\Program Files (x86)\Balance Point Technologies\MAX Workbench\Logs
- If 'Show dialog with available updates' option is checked, MAX Workbench will display a dialog with available updates at startup immediately after initial user login.
- The purpose of the Download Mode is to allow the workbench to download updates by using a Passive or Active mode. The default is Passive mode. If for some reason the Workbench is not able to download in Passive mode, switch to Active mode.
- Click Close

| Company:        | Exact MAX Sample Company | > |  |
|-----------------|--------------------------|---|--|
| Database:       | ExactMAXSAM              |   |  |
| Authentication: | MAX Authentication       | 3 |  |
| User:           | MANAGER                  |   |  |
| Password:       | *******                  |   |  |
|                 | Remember password        |   |  |
|                 |                          |   |  |

- Select a Company from the Company dropdown
- Select Authentication Type from the Authentication dropdown
- Enter the MAX User and Password
- Click Enter

### **Main Window**



- Click on the Setup button at the top left corner to open the Setup window. By default, only the Settings tab will be available for regular users.
- The rest of the configuration settings will be made available only to users that are designated as Supervisors in Exact MAX.

### **Registration Configuration**

| 💽 Setup                |            |   |                   |
|------------------------|------------|---|-------------------|
|                        |            |   | Download Software |
| Settings               | Site:      | 0 registered applications!<br>Invalid registration information! |                   |
| Registration           | Key:       | Load Registration   |                   |
| A                      | Registered | Application Expiration Date Days Left                           |                   |
| Application Management |            | Advanced Commissions  |                   |
| Installed Applications |            | Advanced Forecast   | E                 |
|                        |            | BOM Loader  |                   |
| Manage Environments    |            | BOM Manager   |                   |
|                        |            | Consignment Orders  |                   |
|                        |            | Data Collection – Inventory                                     |                   |
|                        |            | Data Collection – Inventory for Quickbooks                      |                   |
|                        |            | Data Collection – Labor   |                   |
|                        |            | Data Collection – Labor for Quickbooks                          |                   |
|                        |            | Data Collection – Shipping                                      |                   |
|                        |            | Data Collection – Shipping for Quickbooks                       |                   |
|                        |            | Data Collection – Shop Floor                                    | -                 |
|                        |            |   | Close             |

- The Registration configuration tab will contain a list of all available applications for purchase. The Site and Key will be provided by Balance Point and they are required in order to use purchased applications. To load or refresh registered applications do the following:
  - Enter the Site and Key provided by Balance Point
  - Click Load Registration
- Information on this window will be loaded successfully only if a connection to the internet is available.
- Some of the common errors on this window are shown below
  - Invalid Site or Key

| Site: | TestCompany                      |                   | stered applications!<br>d registration information! |
|-------|----------------------------------|-------------------|---|
| Key:  | 7B7N3J0D6O4P2M1F5M0T8V4B1C8M5T2B | Load Registration |   |

- Internet connection is not available

| Site: | TestCompany                      |                   | 0 registered applications!<br>Web connection could not be established!   | <u>^</u> |
|-------|----------------------------------|-------------------|--|----------|
| Key:  | 7B7N3J0D6O4P2M1F5M0T8V4B1C8M5T2B | Load Registration | Connection to the server could not be established. This might be caused by<br>connection issues or invalid registration specification. Local registration<br>information is currently being used | *        |

### **Application Management**

| 💽 Setup                |  |   |                   |
|------------------------|--|---|-------------------|
|                        |  |   | Download Software |
| Settings               | Exact MAX Sample Company                     | Application Allow                       |                   |
| Registration           | <ul> <li>JackMacintosh</li> </ul>            | BOM Loader                              |                   |
|                        | MANAGER                                      | Doc Manage                              |                   |
| Application Management | <ul> <li>MikeTrigger</li> </ul>              | Part Cloner                             |                   |
|                        | <ul> <li>TylorPeskin</li> </ul>              |   |                   |
| Installed Applications | MWTestCompany                                |   |                   |
|                        | Shop Pulse Test Company                      |   |                   |
| Manage Environments    |  |   |                   |
|                        |  |   |                   |
|                        |  |   |                   |
|                        |  |   |                   |
|                        |  |   |                   |
|                        |  |   |                   |
|                        |  |   |                   |
|                        |  |   |                   |
|                        | SQL Server: ASENIVANOV-PC Database: ExactMAX | (SAM User ID: Trusted SQL Connection: 🗹 |                   |
|                        |  |   | Close             |

- All MAX Companies and their users will be listed on this tab. Clicking on the company name will give us a list of all applications included in the purchased Site and Key
- An application will have to be allowed for a company before it becomes available on a user level.

| 💽 Setup                | internet connection is not available               |                                 |                       |
|------------------------|--|---------------------------------|-----------------------|
|                        |  |                                 | Download Applications |
| Settings               | Exact MAX Sample Company                           | Application Allow               |                       |
| Registration           | <ul> <li>JackMacintosh</li> </ul>                  | BOM Loader                      |                       |
|                        | MANAGER  | BOM Manager 🛛 🕅                 |                       |
| Application Management | <ul> <li>MikeTrigger</li> </ul>                    | CON                             |                       |
| Settings               | Exact MAX Sample Company                           | Application Allow Administrator |                       |
| Registration           | <ul> <li>JackMacintosh</li> <li>MANAGER</li> </ul> | BOM Manager 📄 📄                 |                       |

oonnood oppications

### **Installed Applications**

| 💽 Setup                |              |             |  |                       |            |                       |
|------------------------|--------------|-------------|--|-----------------------|------------|-----------------------|
|                        |              |             |  |                       |            | Download Applications |
| Settings               |              |             |  |                       |            |                       |
| Registration           | Installation |             | Files (x86)\Balance Point Technologies           |                       |            |                       |
| negistration           | Installed    | Application | Source   | Last Modified         | Version    |                       |
| Application Management |              | BOM Loader  | C:\Program Files (x86)\Balance Point Technologie | 12/18/2013 6:35:00 AM | 13.12.18.1 |                       |
|                        |              | BOM Manager | _  |                       |            |                       |
| Installed Applications |              | CON         |  |                       |            |                       |
|                        |              |             |  |                       |            |                       |

- The purpose of this tab is to provide a quick and easy way of detecting which of the purchased applications have been installed and which have not been installed.
- Click the Browse button and specify the installation folder of all registered application. The applications will have to installed in the same folder, otherwise, not all of them will be displayed in the list of installed application.

| Setup                  |   |          |  |                       |
|------------------------|---|----------|--|-----------------------|
|                        |   |          |  | Download Applications |
| Settings               | Work environments to modify:<br>JackMacintosh |          | Work environments to copy from:<br>JackMacintosh | Copy Mode             |
|                        | MANAGER<br>MikeTrigger                        |          | MANAGER<br>MikeTrigger                           | Add                   |
| Registration           | Wikeringger                                   |          | Mikeringger                                      |                       |
| Application Management |   | New Item |  | Сору                  |
|                        | Sales Orders                                  |          | MS-101666-001 Rev 1 Cold Cote                    |                       |
| Installed Applications | Sales Orders                                  |          |  |                       |
| Manage Environments    |   |          |  |                       |
| -                      |   |          |  |                       |
|                        |   |          |  |                       |
|                        |   |          | <b>P</b>   |                       |
|                        |   |          | Completed Projects                               |                       |
|                        |   |          |  |                       |
|                        |   |          |  |                       |
|                        |   |          |  |                       |
|                        |   |          |  |                       |
|                        |   |          |  |                       |
|                        |   |          |  | Close                 |

### **Manage Environments**

• This tab will allow managers to configure or simply jump start the work environment of users in the current Company. Left side of the window is the target work area or the work area that needs to be modified. The right side of the window is where items will be

copied from. Both sides contain the same list of users with the exception that only the work environments on the left side are editable.

- There are two copy modes Copy and Replace.
  - Copy mode will copy everything from the selected user on the right to the selected user on the left by adding the items without erasing any of the already included items.

| 💽 Setup                |  |                                       |   |           |  |  |
|------------------------|--|---------------------------------------|---|-----------|--|--|
|                        |  |                                       | Download Applications                                       |           |  |  |
| Settings               | Work environments to modify:<br>JackMacintosh<br>MANAGER |                                       | Work environments to copy from:<br>JackMacintosh<br>MANAGER | Copy Mode |  |  |
| Registration           | MikeTrigger  | · · · · · · · · · · · · · · · · · · · | MikeTrigger   |           |  |  |
| Application Management |  | New Item                              |   | Сору      |  |  |
| Installed Applications | Sales Orders   | Completed Projects                    | MS-101666-001 Rev 1 Cold Cote                               |           |  |  |
| Manage Environments    |  |                                       |   |           |  |  |
|                        |  |                                       |   |           |  |  |
|                        |  |                                       |   |           |  |  |
|                        | MS-101666-001 Rev 1 Cold Cote                            |                                       | Completed Projects  |           |  |  |
|                        |  |                                       |   |           |  |  |
|                        |  |                                       |   |           |  |  |
|                        |  |                                       |   |           |  |  |
|                        |  |                                       |   |           |  |  |

- Replace mode will erase all existing items in the user on the left and will add the items from the user on the right side.

| Setup                  |                               |          |                                 |                       |
|------------------------|-------------------------------|----------|---------------------------------|-----------------------|
|                        |                               |          |                                 | Download Applications |
| Settings               | Work environments to modify:  |          | Work environments to copy from: | Copy Mode             |
| occurgo                | JackMacintosh<br>MANAGER      |          | JackMacintosh<br>MANAGER        | O Add O Replace       |
| Registration           | MikeTrigger                   |          | MikeTrigger                     |                       |
|                        |                               | New Item |                                 | Сору                  |
| Application Management |                               |          |                                 |                       |
| Installed Applications | MS-101666-001 Rev 1 Cold Cote |          | MS-101666-001 Rev 1 Cold Cote   |                       |
| instance repriced ons  |                               |          |                                 |                       |
| Manage Environments    |                               |          |                                 |                       |
|                        |                               |          |                                 |                       |
|                        | a.                            |          |                                 |                       |
|                        |                               |          |                                 |                       |
|                        | Completed Projects            |          | Completed Projects              |                       |
|                        |                               |          |                                 |                       |
|                        |                               |          |                                 |                       |
|                        |                               |          |                                 |                       |
|                        |                               |          |                                 |                       |
|                        |                               |          |                                 |                       |

| Main Window Work Area | Add new<br>Item |                          |                   |
|-----------------------|-----------------|--------------------------|-------------------|
|                       | врт 🖶           | Exact MAX Sample Company | MANAGER           |
|                       |                 |                          |                   |
|                       |                 |                          |                   |
|                       |                 |                          |                   |
|                       |                 |                          |                   |
|                       |                 |                          |                   |
|                       |                 |                          |                   |
|                       |                 |                          |                   |
|                       |                 |                          |                   |
|                       |                 |                          |                   |
|                       |                 | Balance Point T          | echnologies, Inc. |

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- Click on the Add New Item button
- Right Click on the Main Window to change the window mode.
- There are two types of item
  - Single Item

| ſ | * Item Selection                |        |          |  |  | 23 | 1 |
|---|---------------------------------|--------|----------|--|--|----|---|
| r | Single Item                     | Folder | Designer |  |  |    |   |
|   | Display Text:<br>File Path/URL: |        |          |  |  |    |   |

- a) The value of Display Text is user defined
- b) The value of File Path/URL could be a path to a file or an URL for opening web links.
  - 1. To specify a file click on the Browse button, select a file ad click OK.
  - 2. To specify a URL, type in the name of the web site in the Display Text text field and type in the web address of the web site.

| Ttem Selection                        |        |          |  |  |
|---------------------------------------|--------|----------|--|--|
| Single Item                           | Folder | Designer |  |  |
| Display Text: Go<br>File Path/URL: ww | -      |          |  |  |

- Folder

| Titem Selection                   |   |
|-----------------------------------|---|
| Single Item Folder Designer       |   |
| Folder Name: My First Folder      | Add a new item Display Text: File Path/URL: Include |
| Item Source Last Modified Exclude |   |
|                                   | Create Cancel                                       |

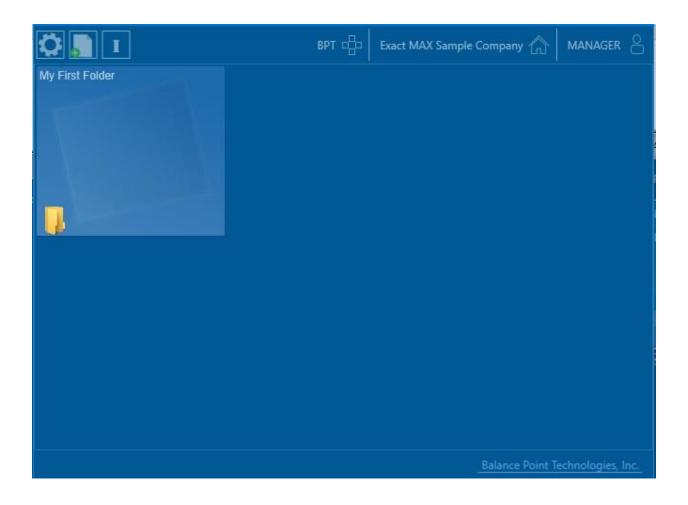
- a) Folder name is required
- b) Items can be added individually by using the Add a new item group box
  - 1) Click on the Browse button, select a file, click OK, click Include

| Titem Selection                         |   |                          |               |
|---|---|--------------------------|---------------|
| Single Item Folder                      | Designer  |                          |               |
| Folder Name: My First Folder            | Add a new item<br>Display Text:<br>File Path/URL:                         |                          | <br>Include   |
| Item                                    | Source  | Last Modified            | Exclude       |
| install_flashplayer11x32au_mssd_aaa_aih | C:\Users\Asen Ivanov\Downloads\install_flashplayer11x32au_mssd_aaa_aih.ex | te 11/21/2013 5:49:55 AN | *             |
|   |   |                          | Create Cancel |

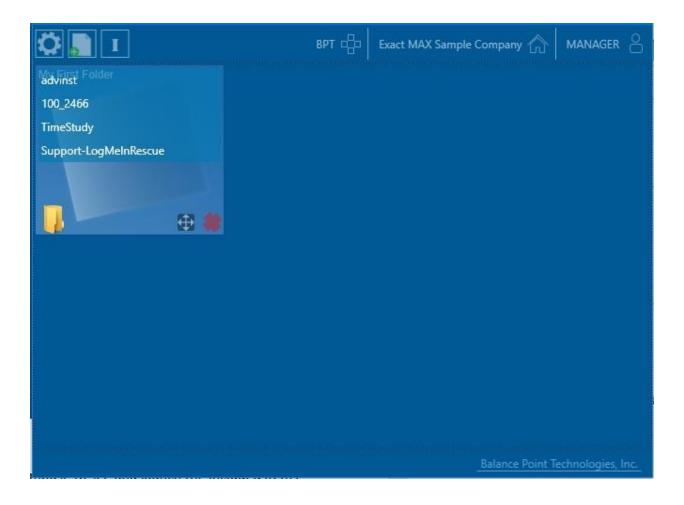
c) Multiple Items can also be added by dragging and dropping them into the data grid on the screen.

| Ttem Selection                          |                             |  |                        |               |
|---|-----------------------------|--|------------------------|---------------|
| Single Item Folder [                    | Designer                    |  |                        |               |
| Folder Name: My First Folder            |                             | Add a new item Display Text: File Path/URL:      |                        |               |
| Item                                    | Source                      |  | Last Modified          | Exclude       |
| install_flashplayer11x32au_mssd_aaa_aih | C:\Users\Asen Ivanov\Downlo | oads\install_flashplayer11x32au_mssd_aaa_aih.exe | 11/21/2013 5:49:55 AM  | *             |
| witled                                  | C:\Users\Asen Ivanov\Downlo | ads\Untitled.png                                 | 12/4/2013 1:01:02 PM   | *             |
| VS2012.4                                | C:\Users\Asen Ivanov\Downlo | ads\VS2012.4.exe                                 | 12/17/2013 12:36:33 PM | *             |
| wderr                                   | C:\Users\Asen Ivanov\Downlo | ads\wderr.jpg                                    | 12/3/2013 9:12:14 AM   | *             |
| WebinariaSetup                          | C:\Users\Asen Ivanov\Downlo | ads\WebinariaSetup.exe                           | 11/21/2013 7:04:00 AM  | *             |
|   |                             |  |                        | Create Cancel |

• Click Create to create the new Item.



- Hover over the item with the mouse to see and launch the included items
- Only Items that are folders support that capability.



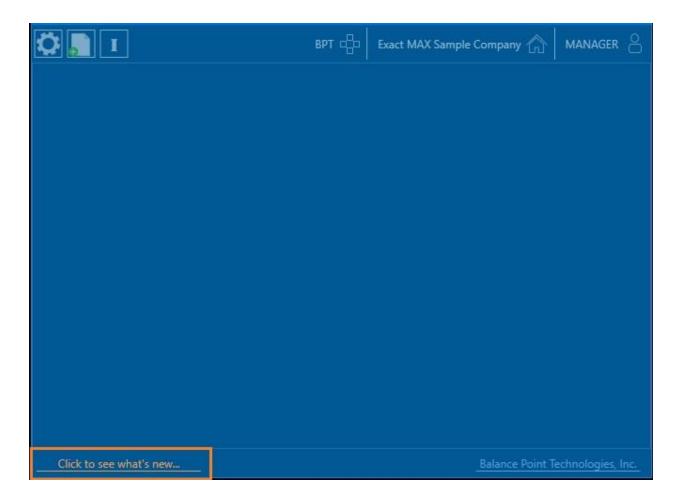
### **Item Designer**

- Item Designer can be accessed by right-clicking on any item on the Main Window
- Right-clicking on an item will also allow changing the Display Text, modifying the source of a Single Item or modifying the contents of a Folder.
- The Item Designer will allow the user to personalize the items by changing the font, color or size of the text and changing the background color of an item.
- Click Save Changes to save and apply the new appearance of the item.

| Folder Configuration   |                 | (1)  |                  |                 |                     |
|--|-----------------|--|------------------|-----------------|---------------------|
| Folder   | Designer        |  |                  |                 |                     |
|  |                 | Change Color of<br>Background<br>Foreground  |                  |                 |                     |
| Font<br>Arial<br>Batang<br>BatangChe<br>Gun gsuh<br>GungsuhChe<br>Courier New<br>DeunPenh<br>DokChampa<br>Font Size: | 12              | Brush Color Name<br>AliceBlue<br>AntiqueWhite<br>Aqua<br>Aquamarine<br>Azure<br>Beige<br>R<br>G<br>B | 29<br>107<br>172 | My First Folder | Save Changes Cancel |
| MAX Workbend<br>My Fi<br>Folde   | General Plastic | s & Composites 🖷   | Exact MAX Sam    | ple Company 🏠   | MANAGER             |
|  |                 |  |                  |                 |                     |
|  |                 |  |                  | Balance Point T | echnologies, Inc.   |

### **Software Updates**

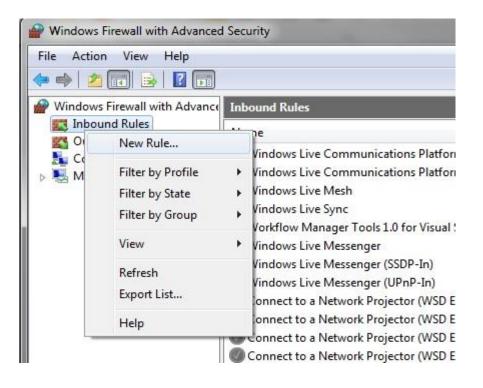
- MAX Workbench will notify when a new version of MAX Workbench or a registered application is available. The new version will be automatically downloaded, installed and added to the main application window only if the Application Management tab on the Setup window has been properly configured.
- In case there is an available update, MAX Workbench will display an indicator on the following places:



| Setup                    |               |   |                 |                   |                          |                         |                   |
|--------------------------|---------------|---|-----------------|-------------------|--------------------------|-------------------------|-------------------|
|                          |               |   |                 |                   |                          | Click to see what's new | Download Software |
| Settings<br>Registration | Site:<br>Key: | TestCompany<br>787N3J0D6O4P2M1F5M0T8V4B1C8M5T2B                           |                 | Load Registration | 3 registered application | ons!                    |                   |
| Application Management   | Registered    | Application   | Expiration Date | Days Left         |                          |                         | <b>^</b>          |
| Installed Applications   |               | Advanced Commissions<br>Advanced Forecast                                 |                 |                   |                          |                         |                   |
| Manage Environments      | V             | BOM Loader<br>BOM Manager   | 3/7/2014        | 73                |                          |                         |                   |
|                          |               | CON<br>Consignment Orders   |                 |                   |                          |                         |                   |
|                          |               | Data Collection – Inventory<br>Data Collection – Inventory for Quickbooks |                 |                   |                          |                         |                   |
|                          |               | Data Collection – Labor   |                 |                   |                          |                         |                   |
|                          |               | Data Collection – Labor for Quickbooks<br>Data Collection – Laborer       |                 |                   |                          |                         |                   |
|                          |               | Data Collection – Shipping  |                 |                   |                          |                         | ▼<br>Close        |

### **Firewall configuration**

- In some cases, MAX Workbench downloads might be blocked by the Firewall.
- Follow the steps described below to allow MAX Workbench downloads
  - Open Control Panel > Windows Firewall
  - Click Advanced Settings. The Windows Firewall Advanced Settings dialog displays
  - Right Click on Inbound Rules and select New Rule



- The New Inbound Rule Wizard displays. Check the Program option. Click Next

| Prev Inbound Rule Wiza                          | ard   |
|---|---|
| Rule Type<br>Select the type of firewall rule t | to create.  |
| Steps:<br>Rule Type Program                     | What type of rule would you like to create?   |
| <ul> <li>Action</li> <li>Profile</li> </ul>     | <ul> <li>Program<br/>Rule that controls connections for a program.</li> </ul>                           |
| Name  | <ul> <li>Port<br/>Rule that controls connections for a TCP or UDP port.</li> <li>Predefined:</li> </ul> |
|   | Connect to a Network Projector  Rule that controls connections for a Windows experience.  Custom        |
|   | Custom rule.  |
|   | Learn more about rule types   |
|   | < Back Next > Cancel  |

- Check This program path option
- Browse to the installation folder of MAX Workbench
- Select MAX Workbench.exe and click Open
- Click Next

| Pow Inbound Rule Wiz            | ard  |
|---------------------------------|--|
| Program                         |  |
| Specify the full program path a | and executable name of the program that this rule matches.                           |
| Steps:                          |  |
| Rule Type                       | Does this rule apply to all programs or a specific program?                          |
| Program                         |  |
| Action                          | All programs Dub and interventions on the same test but match at each at a superior. |
| Profile                         | Rule applies to all connections on the computer that match other rule properties.    |
| Name                            | This program path:   |
|                                 | (x86)\Balance Point Technologies\MAX Workbench\MAX Workbench.exe Browse              |
|                                 | Example: c:\path\program.exe<br>%ProgramFiles%\browser\browser.exe                   |
|                                 | Learn more about specifying programs   |

- Check Allow the connection if it is secure option and Click Next

| Prev Inbound Rule Wiza                                       | ard   |
|--|---|
| Action   |   |
| Specify the action to be taken                               | when a connection matches the conditions specified in the rule.   |
| Steps:   |   |
| Rule Type  | What action should be taken when a connection matches the specified conditions?   |
| Program  | Allow the connection  |
| <ul> <li>Action</li> <li>Users</li> </ul>                    | This includes connections that are protected with IPsec as well as those are not.   |
| <ul> <li>Computers</li> <li>Profile</li> <li>Name</li> </ul> | <ul> <li>Allow the connection if it is secure         This includes only connections that have been authenticated by using IPsec. Connections will be secured using the settings in IPsec properties and rules in the Connection Security Rule node.         Customize         Block the connection     </li> </ul> |
|  | Learn more about actions          < Back  |

- If needed, specify the users that are allowed to use the connection
- Click Next

| Users<br>Specify the users that are al                         | lowed to make the connection specified by this rule.   |
|--|--|
| Steps:<br>Rule Type<br>Program<br>Action<br>Users<br>Computers | Authorized users  Only allow connections from these users  Add  Remove   |
| <ul> <li>Profile</li> <li>Name</li> </ul>                      | Exceptions  Skip this rule for connections from these users  Add  Remove   |
|  | Note: user identities can only be verified if an authentication method that carries user identity is used.           Learn more about using authorization           < Back |

- If needed, specify the computers that are allowed to use the connection
- Click Next

| Computers<br>Specify the computers that                        | are allowed to make the connection specified by this rule.   |
|--|--|
| Steps:<br>Rule Type<br>Program<br>Action<br>Users<br>Computers | Authorized computers  Only allow connections from these computers  Add  Remove   |
| <ul> <li>Profile</li> <li>Name</li> </ul>                      | Exceptions  Skip this rule for connections from these computers  Add  Remove   |
|  | Note: computer identities can only be verified if an authentication method that carries computer identity is used.         Learn more about using authorization         < Back |

- Select when to apply the rule and Click Next

| Prew Inbound Rule Wi   | izard   |
|--|---|
| Profile<br>Specify the profiles for which                      | h this rule applies.  |
| Steps:<br>Rule Type<br>Program<br>Action<br>Users<br>Computers | When does this rule apply?          Image: Domain Applies when a computer is connected to its corporate domain.         Image: Private          |
| <ul> <li>Profile</li> <li>Name</li> </ul>                      | Applies when a computer is connected to a private network location.  Public  Applies when a computer is connected to a public network location. |
|  | Leam more about profiles           < Back   |

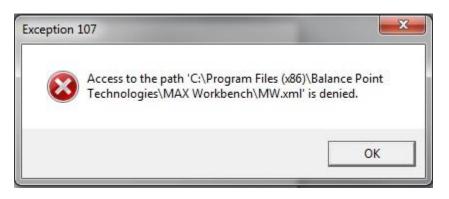
- Specify the name and description of the rule and Click Finish

| Prew Inbound Rule Wizard         | ×   |
|----------------------------------|---|
| Name                             |   |
| Specify the name and description | of this rule.   |
| Steps:                           |   |
| Rule Type                        |   |
| Program                          |   |
| Action                           |   |
| Users                            | Name:   |
| Computers                        | MAX Workbench - Inbound Rule  |
| Profile                          | Description (optional):   |
| Name                             | Allows MAX Workbench to connect to remote server and download application updates |
|                                  | < Back Finish Cancel  |

- MAX Workbench should not be able to download application updates. In case there is a problem downloading, contact your system administrator.

### **Exception handling**

#### **Exception 107**



Exception 107 is caused because of permission issues. The user launching MAX Workbench must have Read/Write permissions to the Balance Point Technologies folder. To enable user Read/Write permissions, closely follow the instructions below.

| E Pictures      | AppIr            | nsights                       | 11               | /29/2014 8:11 PM             | File folder |
|-----------------|------------------|-------------------------------|------------------|------------------------------|-------------|
| 📑 Videos 🌖      | Appli            | Application Verifier          |                  | /16/2013 9:29 PM             | File folder |
|                 | Ask.c            | om                            | 4/               | 29/2014 4:22 PM              | File folder |
| 🝓 Homegroup 🛛 🚺 | Balan            | ce Point Technologies         | 12               | /17/2014 8:23 AM             | File folder |
|                 |                  | Open                          |                  | 10/2014 1:07 PM              | File folder |
| 🖳 Computer 🔰    |                  | Open in new window            |                  | 27/2014 12:57 PM             | File folder |
| 👗 OS (C:)       |                  | Share with                    |                  | /7/2013 8:12 AM              | File folder |
|                 | S                | Shared Folder Synchronization |                  | .4/2011 4:29 PM              | File folder |
| 📬 Network 🛛 🔒   |                  | Restore previous versions     |                  | (3/2014 12:37 PM             | File folder |
|                 | -                |                               | 9/2012 1:16 PM   |                              | File folder |
|                 | )) (C)<br>)) (C) | Scan with ESET Smart Security |                  | (5/2012 11:15 AM             | File folder |
|                 |                  | Advanced options              | •                | /13/2011 12:01               | File folder |
| 1               |                  | Include in library            |                  | (23/2014 7:41 AM File folder | File folder |
|                 |                  |                               |                  |                              | File folder |
|                 | ×                | Send to                       | +                | 14/2011 5:59 PM              | File folder |
|                 |                  | Cut                           |                  | 1/2011 2:25 AM               | File folder |
|                 |                  | Сору                          |                  | 30/2012 2:11 PM              | File folder |
|                 |                  |                               | (7/2012 10:21 AM | File folder                  |             |
|                 |                  | Create shortcut               |                  | 17/2013 4:15 PM              | File folder |
|                 |                  | Delete                        |                  | 10/2011 2:45 PM              | File folder |
| 1               |                  | Rename                        |                  | 2/2014 11:39 AM              | File folder |
|                 |                  | Properties                    |                  | 31/2013 7:19 AM              | File folder |
|                 | Foxit            | Software                      | 97               | 25/2014 5:04 PM              | File folder |

- Right click on the Balance Point Technologies folder and click Properties.

- Click on the Security Tab and **highlight** the user or group of user that will be launching MAX Workbench. The Users group will be used for this example.

| eneral Sharing Security                          | Previous Versions   | Customize      |     |
|--|---------------------|----------------|-----|
| Object name: C:\Program                          | Files (x86)\Balance | Point Technolo | gie |
| Group or user names:                             |                     |                |     |
| SYSTEM   |                     |                | ~   |
| Administrators (DDESK                            | Administrators)     |                |     |
| Users (DDESK\Users)                              |                     |                |     |
| III TruetadInetallar                             |                     |                | Y   |
| <  |                     | >              |     |
| To change permissions, clic                      | k Edit.             | Edit           |     |
|  |                     |                |     |
| Permissions for Users                            | Allov               | v Deny         | _   |
| Full control                                     | ~                   |                | ^   |
| Modify   | ~                   |                |     |
| Read & execute                                   | ~                   |                |     |
| List folder contents                             | ~                   |                |     |
| Read   | ~                   |                |     |
| Write  | ~                   | 8              | Y   |
| For special permissions or ac<br>click Advanced. | dvanced settings,   | Advanced       |     |
|  |                     |                |     |
|  |                     |                |     |

- Click Edit.... and one more time **highlight** the user or group of user that will be launching MAX Workbench.

| Dbject name: C:\Program Fi                     | les (x86)\Balance Poir | nt Technologie |
|--|------------------------|----------------|
| Group or user names:                           |                        |                |
| Secretor owner                                 |                        |                |
| SYSTEM   | 4 4                    |                |
| Administrators (DDESK\A<br>Users (DDESK\Users) | dministrators)         |                |
| InustedInstaller                               |                        | ~              |
| <  |                        | >              |
|  | Add                    | Remove         |
| Permissions for Users                          | Allow                  | Deny           |
| Full control                                   |                        |                |
| Modify   |                        |                |
| Read & execute                                 | $\checkmark$           |                |
| List folder contents                           | $\checkmark$           |                |
|  |                        |                |

- Make sure Full Control permission checkbox has been checked and click Apply, then, click OK until you exit the properties window.