# QDV 7

## INSTALLATION MANUAL

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## PREREQUISITE

### LOCAL COMPUTER (THICK CLIENT)

In order to install and run QDV 7 on your local computer, you need at least the followings:

- Windows XP SP3, Vista SP2, 7, 8, 8.1, 10 or greater. For optimal performances we recommend Windows 7, 8, 8.1 or 10 for 64-bits platform.
- Microsoft .NET Framework 4.0 or greater (4.5, 4.6…).
  The Framework is available at: https://www.microsoft.com/en-us/download/details.aspx?id=48137
  Notice that Windows 8, 8.1 and 10 comes with this framework installed. You must log in as an administrator to install a framework.
- 2 GB Ram (4 GB or more recommended).
- 300 MB of free disk space.
- A minimal screen resolution of 1024x768.

### SERVER (LIGHT CLIENT)

If you want the QDV application to run on a server and be shared by several users, you need as least followings:

- A 64-bits machine
- Windows Server 2008 R2 or greater (2012, etc.)
- Citrix or TSE.
- Microsoft .NET Framework 4.0 or greater (4.5, 4.6…).
  The Framework is available at: https://www.microsoft.com/en-us/download/details.aspx?id=48137
  Notice that Windows 2012 comes with this framework installed.
- 2 GB memory for system + 512 MB per simultaneous user.
- The QDV License server application
- 500 MB of free disk space

## BASIC INSTALLATION

### DOWNLOAD

QDV is available permanently as an official version and as a beta version. They can be downloaded here:

Official: http://www.iaes-software.com/downloads/Setup_QDV_7.exe

Beta: http://www.iaes-software.com/downloads/Setup_QDV_7_Beta.exe

The publisher **guarantees upward compatibility** only meaning that an estimate created or saved on a recent version might not be readable under an older version.

The publisher provides 2 official versions each year and hundreds of beta versions. Upgrades are made automatically in a background thread when you don't block this intentionally.

When you decide to use the beta version, you accept some possible bugs in new features and report issues you may find to publisher.
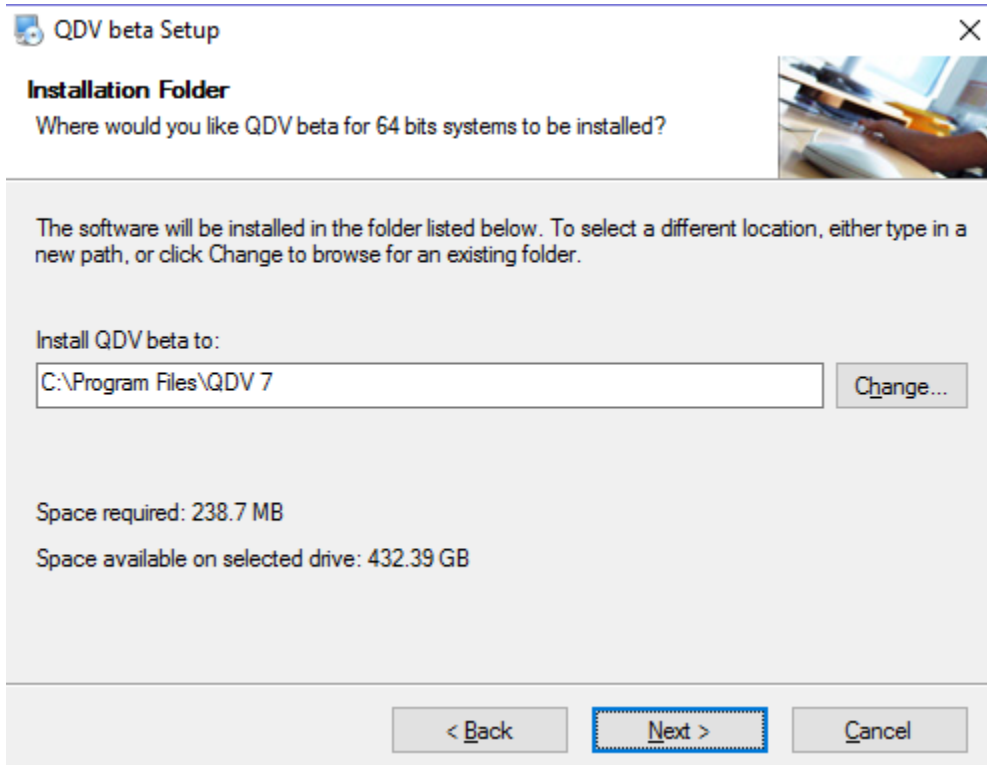
### INSTALLING

Just run the file you downloaded. You may be prompted to elevate permissions if you're not logged in as an administrator.
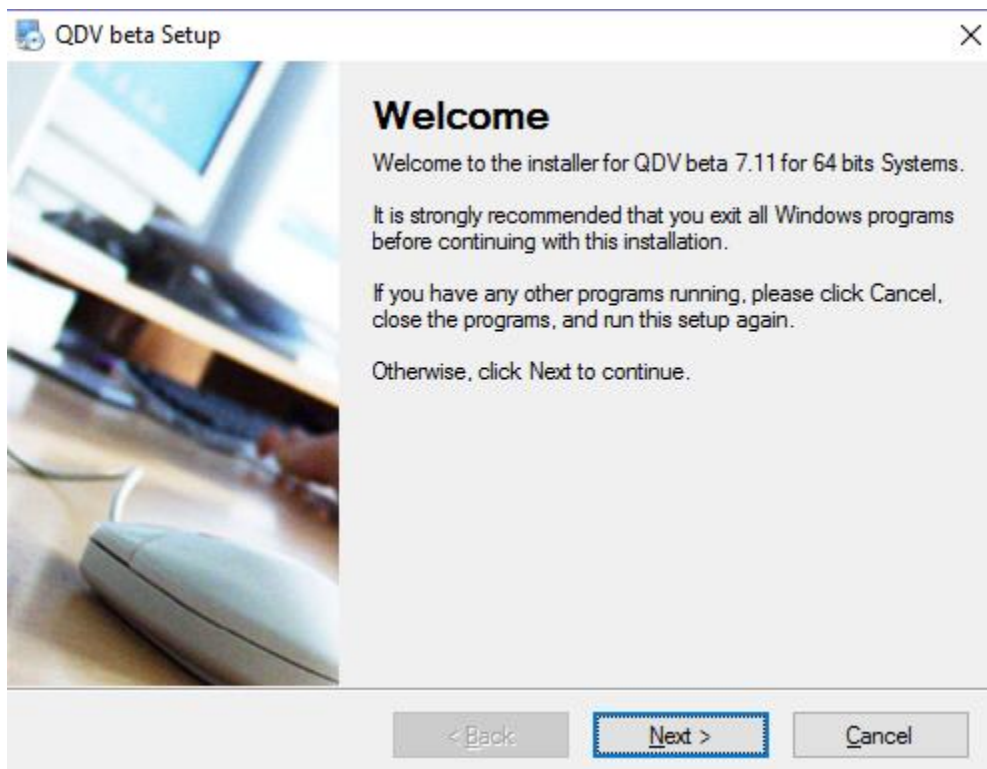


When above screen pops-up, please click NEXT. You may need to close other applications. You'll be prompted to do so if needed.

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Select installation folder if you want to changed it and click NEXT.
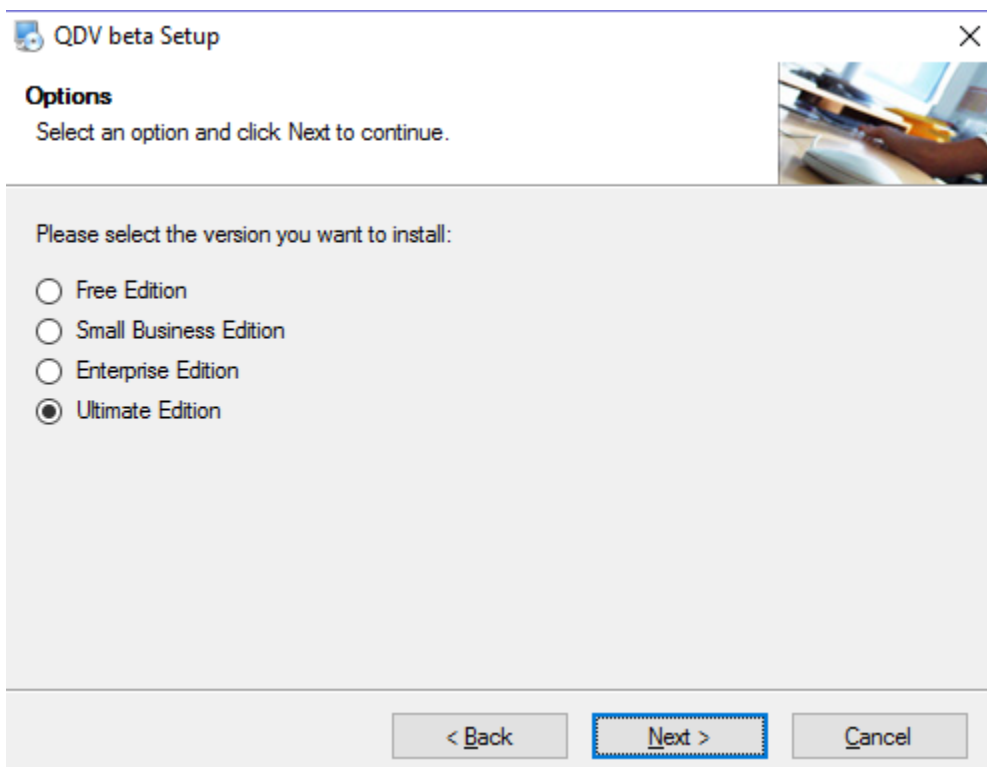
Select the edition you want to install and click NEXT. For more info about editions, please check: http://quick-devis.com/compare-editions/
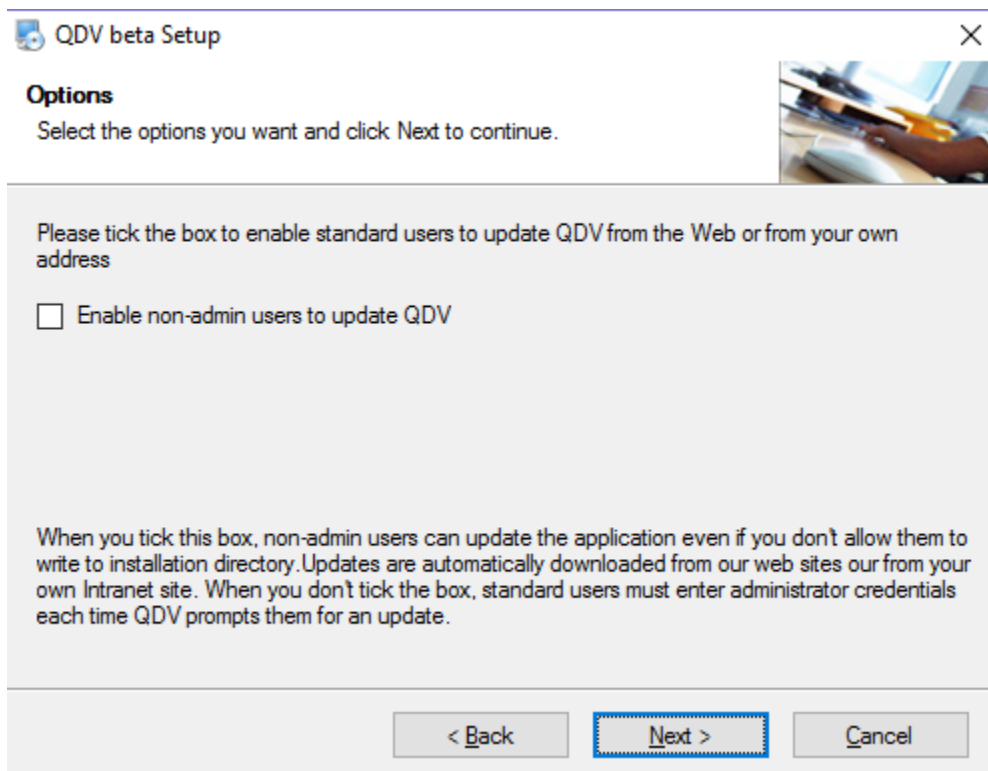


Checking above option installs a service running in the background which install upgrades. When you activate it a user having no administrative permissions will see his application updated. When you don't tick the box, only users having administrative permissions will be able to upgrade QDV.

Make your choice and click NEXT.
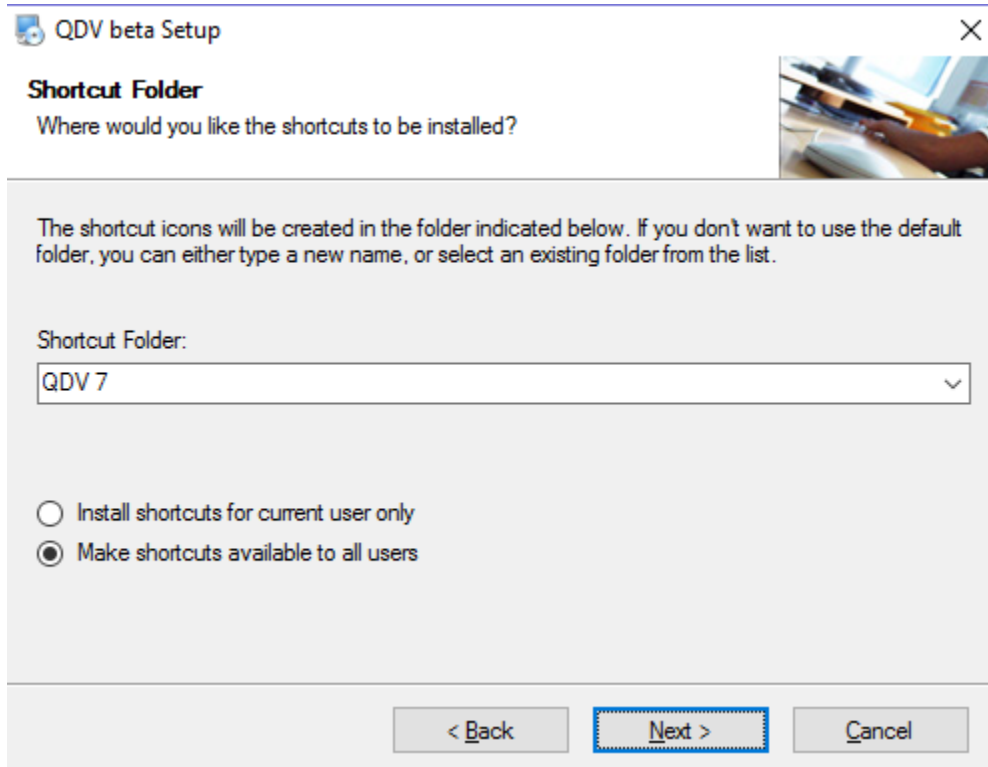
Tell Setup how you want shortcut to be installed. First option will bring shortcuts and start icons in current-user menu and desktop. Second option will show them for all users of the computer. When running Citrix or TSE you must select second option. You can change the name under which QDV menus will appear in your windows menu by editing Shortcut-Folder text box.

Click NEXT when your choice is done.
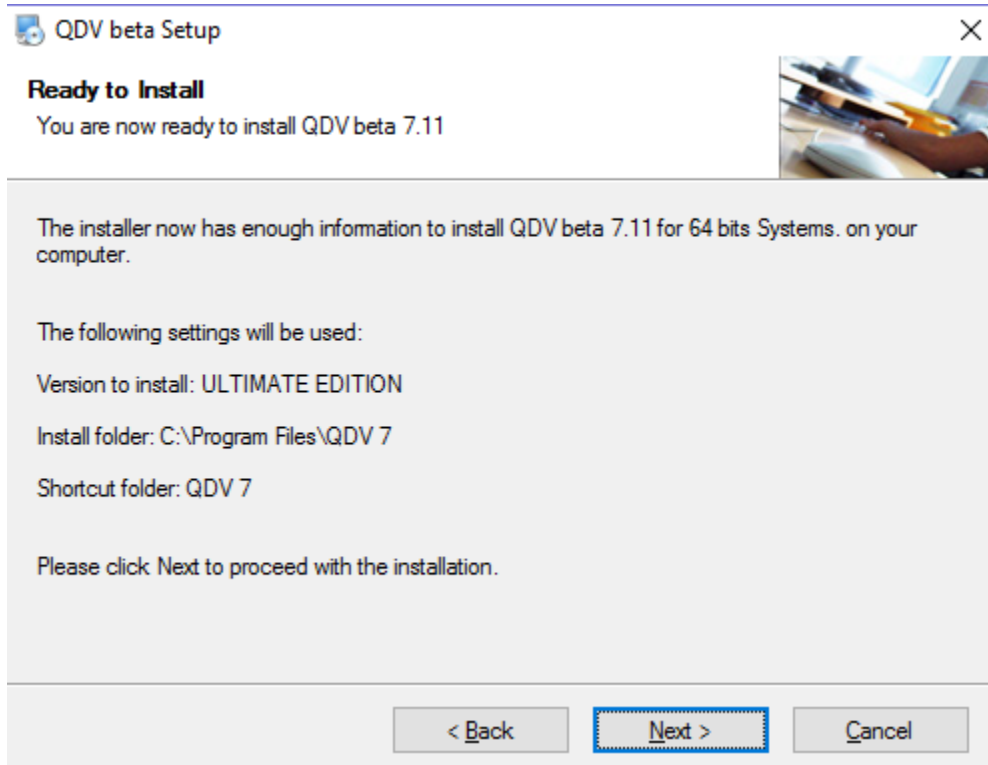
Just review information and click NEXT. You can always click BACK to make changes.
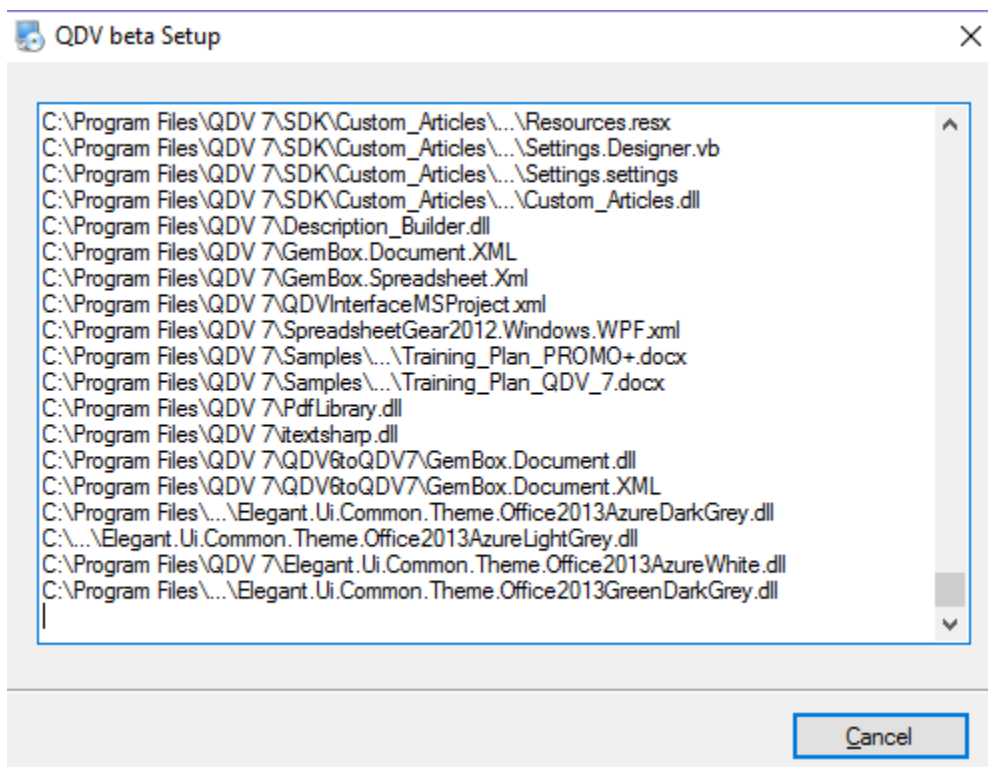
Wait until QDV is completely installed. You may be prompted to retry if a file is blocked by another application such as an anti-virus program. Just click retry if the need arises.

At the end, you should get:
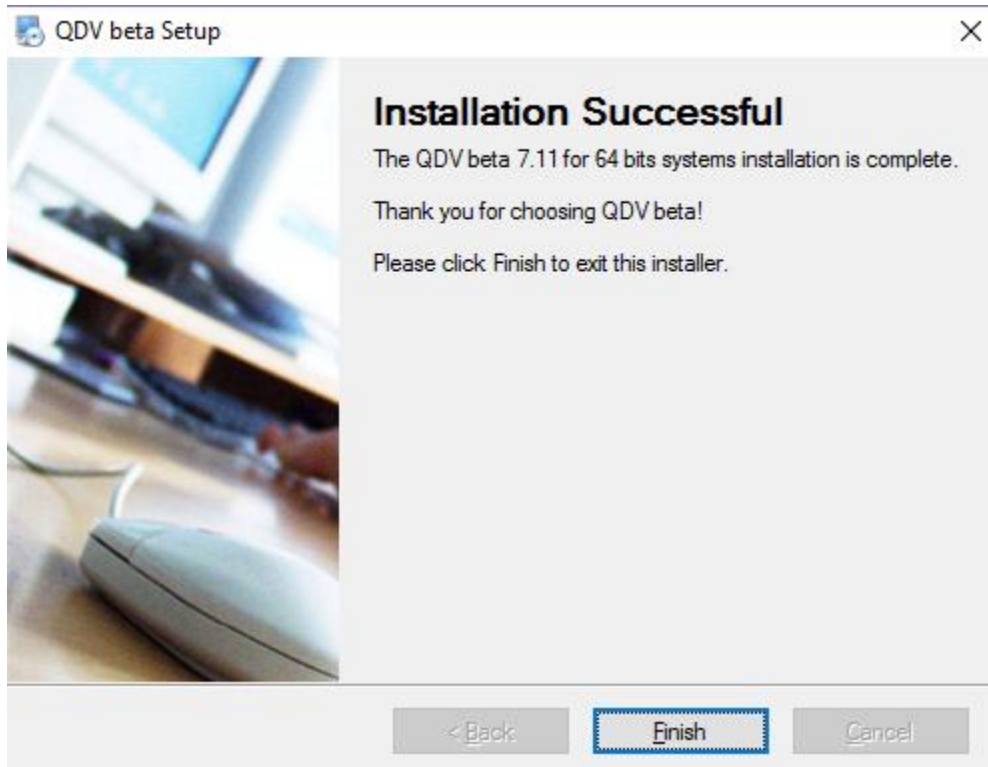
## INSTALLED FILES MENUS AND SHORTCUTS

After QDV is installed, four new menus should appear in your Windows Start menu under /QDV 7:

- QDV 7 (with is the main module to make estimates)
- Converter (which is intended to convert Excel files into estimates or databases)
- Management (Which is a database centralizing estimates for small teams)
- QDV 6 to QDV 7 converter (Which is a tool to convert QDV 6 estimates and databases into QDV 7 format)

Setup also installs 3 icons on desktop:



All files are located under the folder you chose for the installation. Shortcuts are installed in regular folders recommended by Microsoft. Some registry keys are added. User settings are created the first time you start QDV in <local disk>\<User name>\AppData\Roaming\QDV\ and in <local disk>\<User name>\AppData\Local\QDV\ as recommended by Microsoft.

## HELP ME CHOSE BETWEEN LIGHT AND THICK CLIENTS

Thick and light clients have pros and cons which are below listed.

# Installing as Thick Client

| | | | |
|---|---|---|---|
| *Optional Server OneDrive Pro* | **Hosts:** Estimates, Linked Documents.<br>*File Server* | **Hosts:** License Server, ProMo+ emailing service<br>*Small Application Server + Web site* | **Hosts:** ProMo+ database, Article databases, Set databases, Embedded documents<br>*Database Server* |

**Intranet**

*Client*
Hosts QDV 7 and ProMo+

Click-Once Installer. Keeps client synchronized

OneDrive Pro keeps estimates Synchronized (Optional)

**PROS:**
*Fast: Software runs on client computers*
*Lightweight deployment through Click-Once*
*Can work either connected or disconnected*
*Low cost: small servers*
*Centralized Maintenance through Click-Once*
*When using Microsoft Office, it is just needed a client side*

**CONS:**
*Security: Files are, at least temporarily, replicated on clients but their*
*Access can be restricted using passwords or AD groups*
*Only available under Windows*

# Installing under Citrix / TSE (Light Client)

| | | |
|---|---|---|
| **File Server** — Hosts: Estimates, Linked Documents. | **Application Servers (Farm)** — Hosts: QDV 7, ProMo+, License Server, Microsoft Office. | **Database Server** — Hosts: ProMo+ database, Article databases, Set databases, Embedded documents. |

**Citrix or TSE layer**

Intranet

Clients

**PROS:**
Enhanced Security: no sensitive data in pipes
No deployment required
No file transfer over the network (except exports/printout)
Any OS supported at client side
Centralized Maintenance

**CONS:**
Clients must be always connected
Citrix / TSE software and hardware are expensive
Print / export jobs are generally slow
Requires network licenses for Microsoft Office if used
Requires at least 512 MB memory per user session
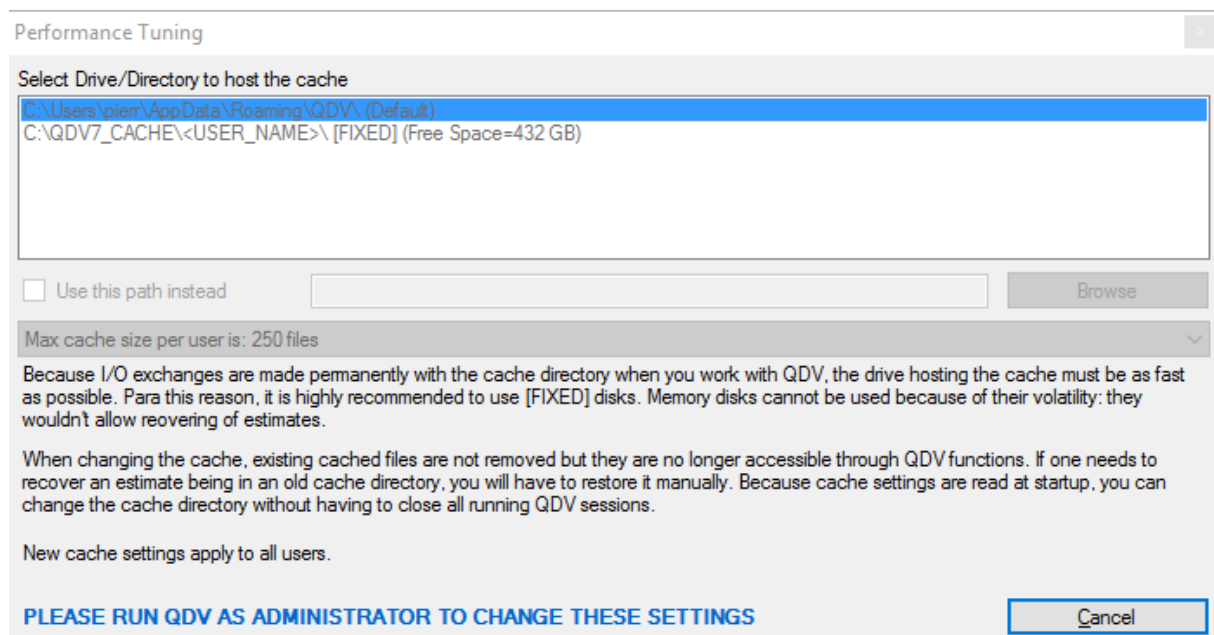
## DEFINING POSITION OF CACHE

For security reason (recovery of estimates), QDV stores a copy of your estimates each time you:

- Save an estimate
- Close an estimate (saving it or not)

They are stored in a FIFO (First in / First out stack) located by default in user's profile.

You can change this and adapt stack size by going to **Administation / General Settings / Performance tuning**.

You must run QDV as an administrator in order to change these settings. Just right click QDV icon and click **Run as administrator**.



Then you can move all cached files to as specific folder.

Warning: it is highly recommended that you use a fast device to support the cache because QDV carries out operation permanently with this device. A slow drive will significantly impact performances.

In multi user environments, QDV creates sub folders of selected folders so that each user has his own cache folder.

## CONTROLLING UPGRADES

You may want to impose the way users upgrade QDV7:

- Either simply restrict the type of upgrades (Beta, Official) users can access from Publisher's web site

- Or publish your own customized QDV7 application from your own Intranet web site

For your own publishing, the principle is very basic: you install QDV 7 on a test machine from which you can upgrade from Publisher's web site and you broadcast your directory through your own web site.

You can then add your own files, shortcuts to QDV7 installation directory and publish versions which are previously tested in your environment.

The publishing tool is installed with QDV7. Check your installation directory for **Publishing_Tool**.

It allows two separate publications: Official and Beta, so you can decide who is entitled to test the application. So, you can install a version on the "template application" machine, test it locally, decide that some beta testers can use it and latter, publish it as an official version to address all users.

In order to cross firewalls barriers, the applications publish HTTP files which are converted to binary files at client side. The encoding used is Base64 which is supported by all platforms. Once your users are able to browse the web or your intranet, they are normally able to upgrade QDV7, you don't have to give specific rights.

## DEFINING TYPE OF UPGRADE

ON USER'S WILL

By default, updates are read from publisher's web site and the end user can decide what they want to download:

- Automatic download of official versions (default)
- Automatic download of official and beta versions
- Manual download of official versions
- No download at all

This information is stored to the registry in the CURRENT_USER section and the user can change the download option at any time from within QDV7.

If you don't want users to change this, QDV7 provides two different methods:

- Placing a file named **QDVUpdateOptions.inf** to the QDV7 installation directory. It's first row containing your choice
- Writing a key to the LOCAL_MACHINE section

When such a key or file exists, the list box is grayed and the user cannot change anything in it.

## QDV7 INSTALLATION MANUAL

Warning: A file has always priority over a key so, if you have such a file, QDV7 doesn't read the key.

When you use **Publishing_Tool**, using a file is a good an easy solution because you can deploy this file directly through the tool by installing it in the application directory of the "template application" machine.

USING A FILE

Create a text file named **QDVUpdateOptions.inf** with, in its very first line, one of the following:

- AUTOMATIC_OFFICIAL_ONLY (Automatic download of official versions)
- AUTOMATIC_OFFICIAL_AND_BETA (Automatic download of official and beta versions)
- MANUAL_OFFICIAL_ONLY (Manual download of official versions)
- NO_UPDATE_ALLOWED (No download at all)

USING A REGISTRY KEY

The key which controls this is: HKEY_LOCAL_MACHINE\SOFTWARE\QDV\MAIN

Create a string value named **UpdateStatus** and place it the root address as it is referenced by the QDV Publishing application.

The allowed values are:

- AUTOMATIC_OFFICIAL_ONLY (Automatic download of official versions)
- AUTOMATIC_OFFICIAL_AND_BETA (Automatic download of official versions)
- MANUAL_OFFICIAL_ONLY (Manual download of official versions)
- NO_UPDATE_ALLOWED (No download at all)



Pay attention not to alter any other keys in this section.

Once set, you should see update choice list grayed in the menu **File>Help**.
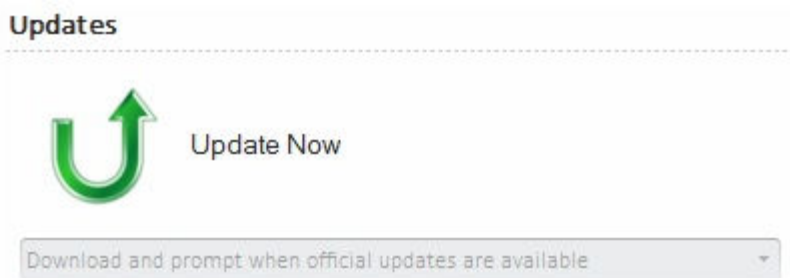


FORCED

For you to force the end users to upgrade, QDV7 provides two different methods:

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- Placing a file named QDVUpdateAddress.inf to the QDV7 installation directory. It's first row containing your choice
- Writing a key to the LOCAL_MACHINE section

Warning: A file has always priority over a key so, if you have such a file, QDV7 doesn't read the key.

USING A FILE

Create a text file named **QDVUpdateAddress.inf** with:

1. first line: address of the web site which contains your published update

2. second line:

- USERMUSTUPGRADE, then the upgrade will be notified to the user
- something else or nothing, then the user will be prompted to upgrade

Example:

*http://www.mywebsite/myQDVupgrade*
*USERMUSTUPGRADE*

USING A REGISTRY KEY

The key which controls this is: **HKEY_LOCAL_MACHINE\SOFTWARE\QDV\MAIN\UserMustUpgrade**

Create a string value named **UpdateStatus** and place it the root address as it is referenced by the QDV Publishing application.

The values of this string can be:

- YES: the user will NOT be prompted
- Something else or nothing: the user will be prompted

## UPGRADING WITHOUT ADMINISTRATOR'S PERMISSIONS

USE CASE

When a user who is not an administrator updates QDV7, the User Account Control prompts him/her for high rights so that it can install files to the Program Files folder and shortcuts in the Start menu or on the desktop, and can access the **Classes_Root** section of the registry.

To prevent the users from writing to the Program Files folder, the administrator must consider letting a service run automatically under high rights.

ACTIVATING THE SERVICE

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The service is named **QDVUpdater**. It is installed when you run the setup program, but is not activated automatically; if you upgrade without the setup program (by the upgrade process through the web site), the service won't be installed. You can install the service without the setup program if the need arises:

1. Run <installation directory>/Install_Updater_Service.cmd with administrator's rights
2. Run services.msc and select QDVUpgrader
3. In the Log On tab, give the service administrator's rights
4. In the General tab, select Automatic as Startup type
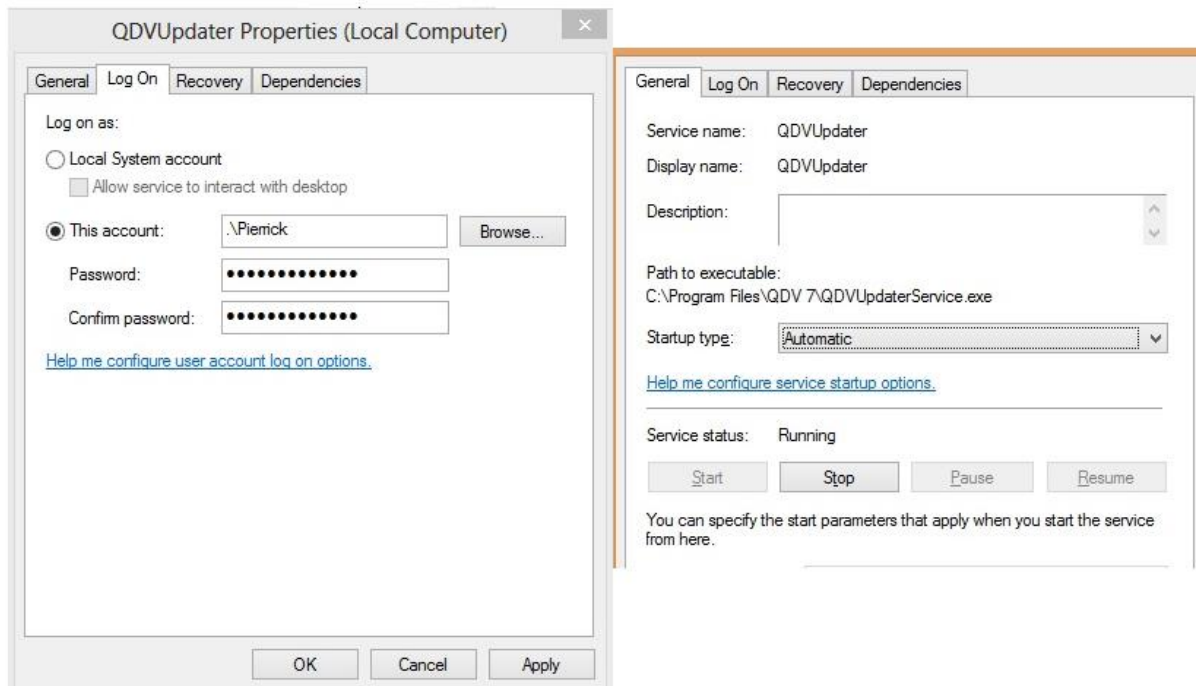


 PARAMETERS

To provide parameters, create a file named **Updater_Service_Settings.inf** and install it in the installation directory (default is C:\Program Files\QDV 7). This file is not mandatory and no statement in this file is mandatory.

It can contain several statements:

Port= communication port which the service uses to listen to the client (default value: 8022)

- IgnoreShortcuts= if YES, the shortcuts on desktop and Start menu are not created *
- IgnoreRegistry=if YES, there is no attempt to write to the registry's HKEY_CLASSES_ROOT section. Usually only a true administrator is allowed to write. To prevent the system from issuing an error message, the others should consider this parameter *

- IgnoreNGEN=if YES, there is no attempt to run NGEN (used to compile the .NET program to native code targeting your processor). This generally results in faster startup and opening of functions when you open them for the first time in a session. NGEN is not needed and you can save up to 2 minutes at update time when you don't run NGEN

* Usually shortcuts/associations are not requested for updates because they are created by the Setup program. But, more of them may be needed in the future; when you deactivate the parameter, you won't benefit from the potential new shortcuts/associations.

Example:

```
Port=8081
IgnoreShortcuts=YES
IgnoreRegistry=YES
IgnoreNGEN=YES
```

NOTE: Usually the port 8081 is less subject to blockage than 8022 (default value)

To take the change into account, restart the **QDVUpdater** and the **QDVUpdateUpdater** services.

## SETTINGS UP THE PUBLISHING TOOL

To set up QDV7 publishing tool, you must first have:

- a machine, connected to the internet and to your intranet to host the template application
- a server hosting a web site (you can also install QDV7 on the server so that you need no other machine)

The publishing tool is delivered and installed with QDV7. You can find it in QDV7 installation directory (usually \Program Files). The program is named **Publishing_Tool.exe**

Create a shortcut to it and run it.
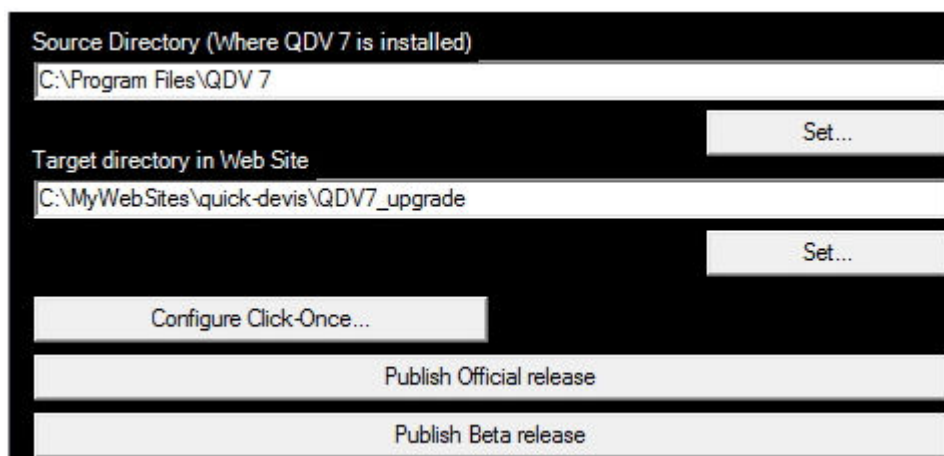
The source directory must be set to the installation directory and the target directory should be a directory in your web site, accessible for read purpose in HTTP mode by all users. You may either use "Set" buttons to define directories or type them.

## PUBLISHING QDV

To publish QDV, click either option:

| Publish Official and Beta releases |
| Publish Beta release only |

When an official version is published, it is automatically copied to beta publication folder so that beta updates are always equal or greater than official updates.

Warning: End users (clients) must have sufficient rights to enable writing to their own QDV installation folder.

## ADDING YOUR OWN FILES

You may want to add you own files and application to QDV7.

In order to do this, you can simply add these files to the "Template Application" machine, inside QDV7 folder. You can also create sub-folders.

All files in or below this folder are published to clients as part of QDV7 application.

## CREATING SHORTCUTS

When publishing your own files or applications (see Adding your Own Files) within QDV folder, you may want to provide end users with shortcuts to them.

In order to do this, create a text file named CustomShortcuts.inf and place it in the QDV7 folder of the "Template Application" machine.

A shortcut line is composed with three parts:

LOCATION

Can be MENU (to have a shortcut in QDV7 start menu) or DESKTOP (to have it on the desktop)

TEXT DISPLAYED

This is the text as displayed in the menu or on the desktop.

FILE

The file name including partial path relative to QDV 7 folder

e.g: if you want to refer to C:\Program (Files)\QDV 7\MyOwnFile.pdf. Use MyOwnFile.pdf. If you want C:\Program (Files)\QDV 7\MyFolder\MyOwnFile.exe, use MyFolder\MyOwnFile.exe

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Below is a sample content of such a file:

> MENU|My File|MyOwnFile.pdf
> DESKTOP|My File|MyOwnFile.pdf
> MENU|My Own Application|MyFolder\MyOwnFile.exe

Would create a shortcut to MyOwnFile.pdf in the start menu, another one on the desktop and a shortcut to MyOwnFile.exe being in \MyFolder in the start menu.

Shortcut icons are assigned by the system: They are read from files when they are applications of from associated registry keys when they are simple files.

<u>Warning</u>: End users (clients) must have sufficient rights to define menus and desktop shortcuts, else creation is simply ignored, without warning message.

In accordance to the way QDV7 was installed at client side using the setup program, the updater installs shortcuts to All_Users or Current_User section. If you installed it for all users and the client has no right to write to All_Users section, the updater will install shortcuts to Current_User section. In order to avoid double shortcuts, the updater checks that the shortcut doesn't already exist in the All_Users section before he adds it to the Current_User section.

## SETTING UP SERVER SIDE

When you use QDV Publishing Tool, using a file is a good an easy solution because you can deploy this file directly through the tool by installing it in the application directory of the "template application" machine.

<u>USING A FILE</u>

Create a text file named **QDVUpdateAddress.inf** with, in its very first line, the web address,

e.g.: http://www.mydomain.com/myaddress

This address must be the root address you used in the Publishing Tool. Refer to Setting up Publishing Tool.

<u>USING A REGISTRY KEY</u>

In HKEY_LOCAL_MACHINE\SOFTWARE\QDV\MAIN

create a string value named UpdateAddress and place in it the root address as it is referenced by the QDV Publishing application.



ab UpdateAddress    REG_SZ    http://www.mydomain.com/myaddress

<u>Warning</u>: Do not to alter any other key of this section.

Once set, you should see this address in the File>Help menu. When the address is not provided to the registry key, QDV searches for publisher's web site and nothing is displayed here.

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Updates

Update Now

Download and prompt when official and beta updates are available ▾

Update from: http://www.mydomain.com/myaddress

## DEPLOYING QDV 7 WITH CLICK ONCE

Click-Once for QDV7 is an installation process developed by Quotalys Ltd / IAES Sarl inspired by the Microsoft Click-Once technology. They work almost similarly (the user just has to click on a web link to have QDV installed and configured in conformity with server side).

Click-Once for QDV7 takes into account specific security concerns meaning that a user cannot alter QDV integrity exactly as if it was installed in locations controlled by administrators and enables you to customize the product.

Click-Once enables the administrator to deploy the application to any computer, regardless of the end user rights; the user doesn't have to be an administrator. In addition, the administrator can impose the configuration:

- S/he can make the database paths 3 and 4 point out some central SQL Server databases (a later change will be enforced to all users on next publication)
- S/he can require that the end user licenses be granted by a central license server
- S/he can force some buttons to be in the user menus definitely, etc.

### REQUIREMENTS ON USER'S SIDE

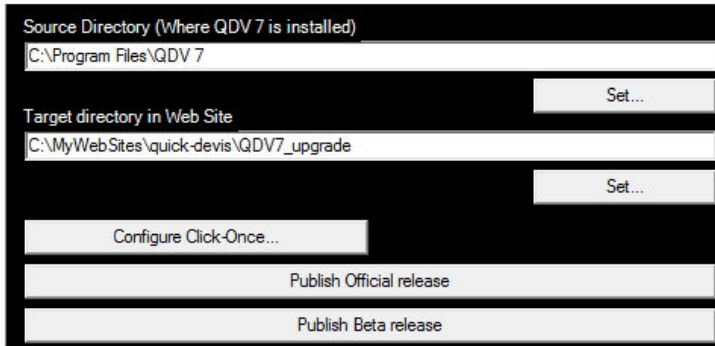The end user runs Windows XP SP3 or a greater version.

NET Framework 4.0 or greater is installed, and also .NET Framework 2.0 (but this Framework is normally installed on all machines through Windows Updates).

First of all, the installer checks for the presence of Framework 4.0 or greater. If it is not found, a message redirects the user to the download page of the Microsoft web site. As any framework installation, its installation requires administrative rights.

### GENERAL PROCEDURE

1. Install the QDV7 source on a computer which will serve as a repository to all client computers
2. Configure QDV7 as wished, setting database paths, licenses, buttons, etc.; the source will be the master as described in the topic Configuration>Settings of new estimates
3. Start <QDV7 installation folder>/Publishing_Tool. To directly publish to a web site located on the same computer, you may need administrative rights; for this purpose, right click "Run as administrator". In the dialog box, the Source directory is preset
4. In the dialog box/Server Settings, set the target directory (enter the path and click the Set button)
5. Click the button Configure Click-Once
6. In the dialog box/All XML Settings, check the box Enforce? of the source settings that you want to keep
7. Click OK; the first dialog box shows
8. Click either button Publish Official/Beta release; this creates the executable Click-Once installer.exe
9. Change the extension and e-mail the executable to all users

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10. Each user restores the extension and launches the installer; this sets up the complete configuration; the application is synchronized with the source.

Source Directory (Where QDV 7 is installed)
C:\Program Files\QDV 7
Set...

Target directory in Web Site
C:\MyWebSites\quick-devis\QDV7_upgrade
Set...

Folder receiving the web pages and accessible from outside through IIS

Configure Click-Once...

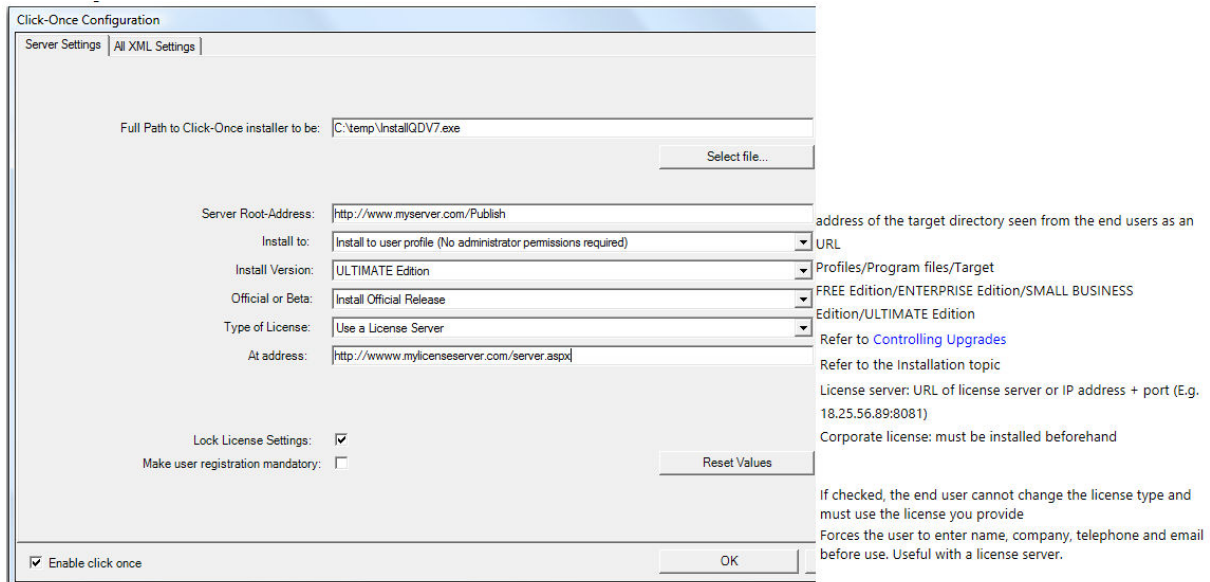Publish Official release

Publish Beta release

Buttons that triggers the creation of Click-Once installer.exe. "Official" for YOUR official release, "Beta" for release that YOU plan to validate

NOTES

- The versions of subscribers to YOUR official version are NOT updated when you publish a beta, but versions of subscribers to YOUR beta version are if you publish an official version with a greater version number
- Beta and Official versions are published into web site separate sub-folders: Official_Vx and Beta _Vx



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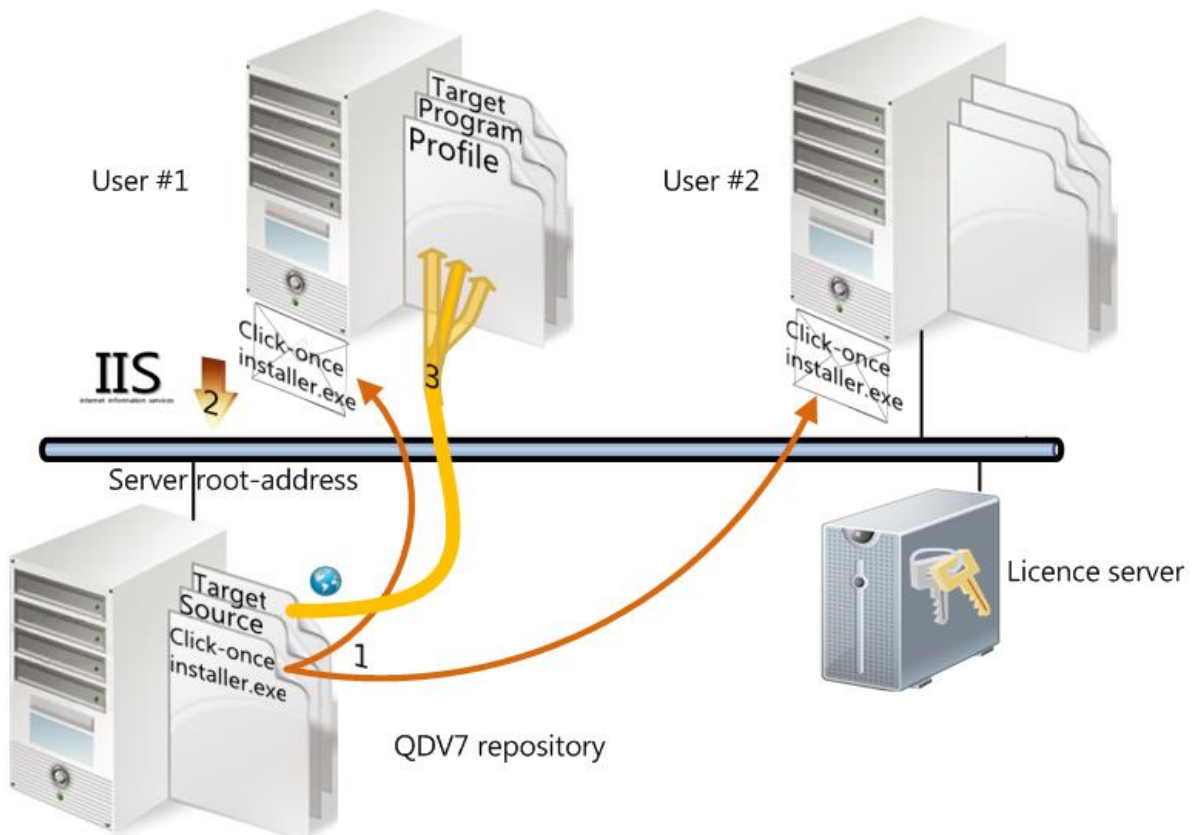
CONFIGURATION



By default, updates are read from publisher's web site and end user can decide what they want to download. They have three deployment options:

- Installation on a per-user basis: to user profile (it does not require administrator rights; no write to the Local_machine section of the registry)
- Installations on a per-machine basis (they require administrator rights):
- Deployment to Program/QDV 7
- Deployment to any target directory

The tab "All XML Settings" lists all the source settings (refer to the topics Configuration, User Interface ...) with their values. Some settings are not displayed because they cannot be deployed, e.g. the default position of windows.

## UNINSTALLING QDV 7

In order to uninstall QDV 7 you can simply go to Start / Settings / Control Panel / APP and features and click the QDV 7 line. This will remove QDV 7 folder and registry keys.

If you want to remove user's data too, you can manually delete the QDV 7 folder being in user's profile: **Users/<User name>/APPData/Roaming**.

When QDV7 is installed via click once, nothing appears in control panel to remove it. You can completely remove the application by deleting the folder **Users/<User name>/APPData/Local/APPS/QDV7**.