

QDMSEE FAQ AND INSTALLATION GUIDE

The purpose of this FAQ is to guide customers through the basic steps to install, register, and configure the QDMS System. The FAQ covers:

- A. System Requirements:** What hardware and operating system you will need.
- B. Installation Options:** On a stand-alone computer or on a client-server?
- C. Check your Display Settings and Operating System**
- D. How to obtain the Installation Components**
- E. Installation Instructions:** How to install QDMS Enterprise Edition
- F. Launching QDMS:** Running QDMS for the first time and connecting to the SQL server.
- G. Registering the Program**
- H. Creating your Live Project**
- I. What Next?** Setting up an Address book, Users, Configuration tables etc.

Note: Prior to installation you should un-install / delete any evaluation copies of QDMS installed on your PC. If you have started work with an evaluation version of QDMS and have data which you want to retain, you should call QDMS Solutions PRIOR to following the steps below.

A. SYSTEM REQUIREMENTS

The system requirements for running QDMS Enterprise Edition are:

Package	Hardware/Software	Minimum	Recommended
SQL Express	Edition	Version 2005	Version 2008 / 2012 / 2014
	Computer Processor	1 GHz	2 GHz
	Memory (RAM)	512 MB	2 GB
	Available Hard Disk Space	1 GB	5 GB
	Operating System	Windows Server 2003 SP1	Windows Server 2012 R2
SQL Standard	Edition	Version 2005	Version 2008 / 2012 / 2014
	Computer Processor	1 GHz	2 GHz
	Memory (RAM)	512 MB	2 GB
	Available Hard Disk Space	1 GB	10 GB
	Operating System	Windows Server 2000	Windows Server 2012 R2
QDMS Application	Computer Processor	1 GHz	3 GHz
	Memory (RAM)	1 GB	2 GB

Available Hard Disk Space	1 GB	10 GB
Display	1024 x 768 16 Bit DPI –100% (96dpi)	1024 x 768 16 Bit DPI –100% (96dpi)
Operating System	Windows XP SP3	Windows XP SP3, Windows 7, 8, 8.1, 10

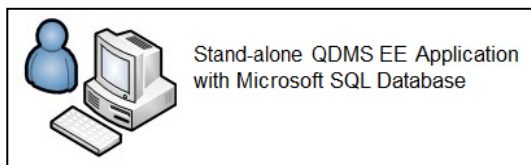
Note: The above is strictly a guide and generic. The requirements vary depending on the number of active projects, active users and sizes of files in use.

B. INSTALLATION OPTIONS

QDMS can be installed in either of two configurations: As a stand-alone program; or on a client-server.

Prior to commencing the software installation, you will need to have decided which configuration you require.

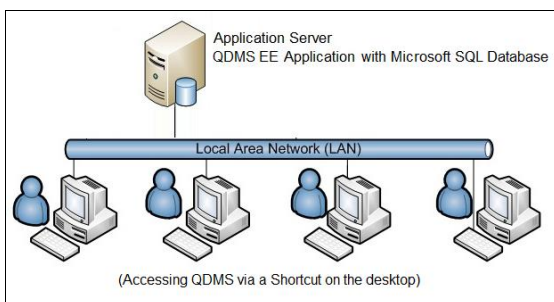
B.1 Stand-alone



QDMS is setup on a stand-alone computer with both QDMS Client Software and QDMS Database running locally.

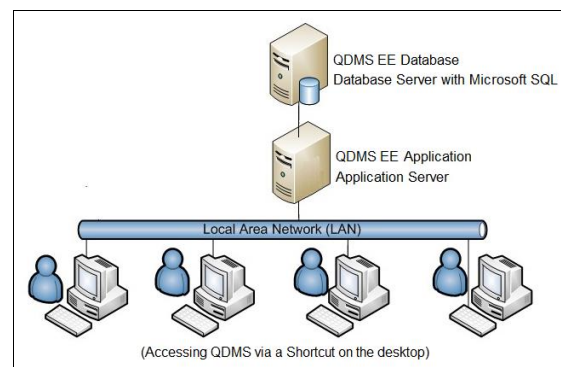
B.2 Client-Server (Two Configurations)

Configuration Type 01



In the Client-Server configuration type 01, both the QDMS Software and the Database will be located on the Server. Each user will have a shortcut on their workstation desktops which are pointing to the QDMS.exe located in the QDMS Application folder on the server.

Configuration Type 02



In the Client-Server configuration type 02, the QDMS Software and the Database will be located on separate servers. Each user will have a shortcut on their workstation desktops which are pointing to the QDMS.exe located in the QDMS Application folder located on the application server.

C. CHECK YOUR DISPLAY SETTINGS AND OPERATING SYSTEM

C.1 Separate installations are available for 64- or 32-bit Operating Systems. You can check your Operating System by right clicking My Computer and selecting Properties. You will require this information to determine which QDMS software installation package you require.

C.2 Check your display settings:

a) In the Control Panel select Display. Set 'Make it easier to read what's on your screen' to 100% if you are using an Operating system Windows 7 or greater.

b) In the Control Panel select Display>Adjust Resolution. Resolution should be set to a **minimum** of 1024 x 768 pixels. Adjust as necessary.

D. HOW TO OBTAIN THE INSTALLATION COMPONENTS

Component	
QASYS.NET4	<p>Located under the QASYS.NET4\ folder in the CD you have received from QDMS Solutions.</p> <p>Or</p> <p>Download from the following link and extract the downloaded zip file to a temporarily folder.</p> <p>http://www.qdmssolutions.com/miscellaneous/download-QDMSEE.html</p>
QDMS Enterprise Edition Setup (32 bit or 64 bit)	<p>Note: Refer to section C.1 on how to determine whether you are running a 32bit or 64 bit operating system. This determine which QDMS Installation file to use. The QDMS Setup file is located under the QDMS\ folder in the CD you have received from QDMS Solutions.</p> <p>Or</p> <p>Download from the following link and extract the downloaded zip file to a temporary folder.</p> <p>http://www.qdmssolutions.com/miscellaneous/download-QDMSEE.html</p> <p>The Setup file contains the following three components:</p> <ul style="list-style-type: none"> • QDMS Enterprise Edition - QDMS Application • SQL Express 2008 R2 - This is the default, compact and free SQL Database which comes with QDMS setup. You have the option to use your own server instance of SQL Server without installing this default version. You



can define your own Server Instance when launching QDMS for the first time. (See the notes in Section F).

- **SQL Management Tools 2008 R2 (Optional)** - SQL Database Management Tools which will help you configure your database if required.

E. INSTALLATION INSTRUCTIONS

Follow the instructions below for either a stand-alone installation (see E.1) or Client-Server installation (see E.2)

E.1 Installation for **Stand-Alone Configuration**

Step 1 – Installing QASYS.NET4

QASYS.NET4 needs to be installed and your computer restarted before installing or running QDMS Enterprise Edition.

a) Locate the file **Setup.exe**: Navigate in to the folder ...\\QASYS.NET4\\ on your CD or extracted downloaded setup where you will see the file titled Ssetup.exe.

b) Run the file **Setup.exe**: Right click on 'setup.exe' and Select **Run as Administrator**. Follow the prompts. Your computer will need to be restarted manually once the installation process is completed.

Step 02 – Installing QDMS Enterprise Edition.

a) Locate the file **Setup.exe**: Navigate to the folder ...\\QDMS\\ on your CD or extracted downloaded setup where you will see the file titled Setup.exe. (See C.1, above to enable you to select the correct folder on your CD).

b) Run the file **Setup.exe**: Right click on Setup.exe and Select **Run as Administrator**, and follow the prompts. Installation can take several minutes.

E.2 Installation for **Client-Server Configurations** (Recommended for multiple users)

Step 1: Install QASYS.NET4 on the Server and all the workstations that will be running QDMS Enterprise Edition. See Section E1 Step 1 above for installation instructions.

Step 2: Install QDMS Enterprise Edition on your Application Server as per the instructions in Section E1 Step 2 above. (In Configuration Type 02, install QDMS Application and SQL Database in their separate servers)

Step 3: On the server (In Configuration Type 02, Database server), select Start > All Programs > Microsoft SQL Server R2 > Configuration Tools > SQL Server Configuration Manager.

Click on SQL Network Configuration>Protocols for QASSQLEXPRESS and Change the Protocols "TCP/IP" and "Shared Memory" to Enable by double clicking and selecting yes against the property Enabled.

Click on SQL Server Services>Right Click on SQL Server (QASSQLEXPRESS) and select restart.

In some instances, you may also will have to configure Server Firewall to accept SQL requests or should be inactivated, please refer to the document **REF-QD-004**.

Step 4: Create Shortcuts on each Workstation Desktop to point to the QDMS.exe located on the Server QDMS application folder.

E.3 Changing the SQL Server / Authentication mode (Optional)

It is possible to change SQL Database information at a later stage Via <Configure Database Server> button in Tools\Options > Program Defaults tab.

QDMSEE is by default configured to use SQL authentication mode. Please refer to the document **REF-QD-003** for Windows Authentication mode and detailed SQL Security Configurations.

F. LAUNCHING QDMS

Double-click on the shortcut icon on your desktop to open QDMS.

If there is no shortcut icon on the desktop you can create one. The application file, QDMS.EXE, can be found at \QASOFT\QDMSEE\ (QDMS installation folder you have defined at the installation). Right click on the file and select 'Create Shortcut'. Drag the shortcut onto the desktop.

As the QDMS Application loads you will be prompted to take a guided tour of QDMS. If you would rather wait until later to do this you can find the **QDMS - GuidedTour.pdf** in the QDMSEE application folder.

Note: If you have chosen to use your own SQL Server instead of the SQL Express 2008 R2 provided in this setup, please define the full path of your server instance when prompted.

G. SOFTWARE REGISTRATION

QDMS Solutions products are normally licensed:

Either to specific workstations that will be able to access the software (Refer section G.2 below) OR

On a Concurrent User basis (Refer section G.3 below)

G.1. CREATE THE LICENSEE COMPANY


Before you can register the software, you must create the Licensee Company within the system.

At the login screen, enter the User ID = QA and the Password = 'qa'.

Select the Demonstration project by double clicking on the Project Name and you will be taken to the Dashboard. This is the starting point for all QDMS actions.

From the **View** menu, select **Address Book**


Click the Edit button to the right of the Company ID drop down list (at the top center of the screen) to get to the Company's window.

 Click on the **New** button to bring up the New Company window.

Enter an appropriate ID for your company (e.g. QAS for QDMS Solutions).

Enter the full company name in the Company field.

 Click the **Save** button.

 Close the New Company screen using the **Close** button.

Close the Company screen using the **Close** button.

Close the Address Book screen using the **Close** button.

G.2 REGISTERING QDMS FOR PER SEAT LICENSING

With **Per Seat** Licensing, each workstation accessing QDMS must be registered. For this reason it is essential for you to go around to every workstation that you are purchasing a license for and choose either the **Register** button from the **Register Reminder** window, or select **Register Program** from the **Help** Menu.

G.2.1 Obtaining a Registration key:

From the **Help** menu, select **Register Program**.

Complete the **Name** and **Organisation** fields.

Select the Contact Information Tab and complete the contact information that QDMS Solutions will use to communicate with you.

Note the **License number** will have been provided to you with your QDMS Solutions CD Rom. This License number should be quoted on all correspondence with QDMS Solutions.

Click the **Add to Log** button. If you have been to each PC you are registering, go to Step 6.

Go to the next computer and return to step 1.

Click either **Print Log** and attach it to your purchase order; or click **Email Log** to electronically mail the log to QDMS Solutions.

G.2.2 Entry of Registration Key:

Once QDMS Solutions have received your purchase order and your registration log, they will either send you Registration Details via mail/fax or send you an updated registration log via email.

If you have received the registration details:

Go to each workstation you placed an order for, enter the registration screen and manually enter the appropriate Registration Key for each machine and click Register.

G.3 REGISTERING QDMS FOR CONCURRENT USER LICENSING

With **Concurrent User Licensing**, the system can be registered from any workstation setup to access the system. Hence the following steps can be performed from any workstation and needs to be done only once.

G.3.1 Obtaining a Registration key:

Follow Steps 1 – 3 in Section G.2.1 above for per seat licensing.

Change the License Type to Concurrent User Licensing

Copy and paste the User Reg No. into an email and send the email to

profound@profoundsolutions.co.za

H. CREATE YOUR LIVE PROJECT

Before creating your first live project you should have worked through the QDMS Guided tour using the Demonstration project. When you are ready to create your new project:

From the **File** menu select **New Project** and click **Next** at the Welcome screen.

Enter the Project Number and Title and click **Next**.

At the Data Transfer screen, choose the **Do not populate** option so that you will create a completely empty first project.

Complete the remaining screens as required and click **Finish** when done.

On completion of this you will be positioned in your new project automatically.

I. WHAT NEXT?

Before you start processing documents and generating transmittals, the following areas of QDMS should be configured:

I.1. POPULATE THE ADDRESS BOOK

QDMS supports the use of either a Project or Global Address Book for each project.

For instructions on setting up your project address book, refer to the QDMS User Guide.

The Address Book is located under the **View** menu and sub-menu **Address Book**.

The Address book is structured in two parts: Companies and Contacts. You must first setup companies before you can create contacts within each company.

I.2. SETUP USERS

Security in QDMS is controlled via User ID's and passwords. You will need to create a User ID for each staff member requiring access to the system.

From the **Tools** menu select **Security – Users and Projects**.



Click on the **Create a New User** button and complete the details about the new user.

Tip: Set the User ID as the initials of the new user. The User should be allocated User Level 1 access at this stage.

Select the Projects that the new user may access by clicking on the **Assign Users to Projects** button and select from the list of projects in the left pane by double clicking on them.

Return to the Dashboard and from the File menu, select Re-enter password to log in as the new user.

I.3. POPULATE THE CONFIGURATION TABLES

There are a number of libraries in QDMS that support drop down lists in various screens. You should populate these tables with values to suit your business.

The Configuration Tables are located under the option **Configuration Tables** from the **View** menu.



Refer to the User Guide for more details.

Tip: See also the Quick Start Check List at the end of Chapter 1 of the QDMS User Guide.

MORE INFORMATION?

For further information on this issue, please contact Profound Project Control Solutions

Phone : 012 654 3053

Cell : 083 454 4439

Email : profound@profoundsoloutuions.co.za

