



## **Installation Manual (2.1.9255)**

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## General

1. It is strongly recommended to make the installation with IT administrator, considering that setup will enable Microsoft IIS Service (with FTP service too) and it will also install Microsoft SQL Server
2. Prerequisite:  
Install the software with the administrator rights.  
**Do not use “RUN AS” command from the user account to launch installation**
3. Access to the installation source (e.g. File share, DVD, CD or similar) is mandatory

## Timing and extra info

On first run of iQuoteSetup it will automatically download all required components during installation (depending on what you are installing, it downloads from about 2GB to more than 6GB). This time is strongly related to your internet connection speed.

The full installation with all packages already downloaded requires **20 minutes**

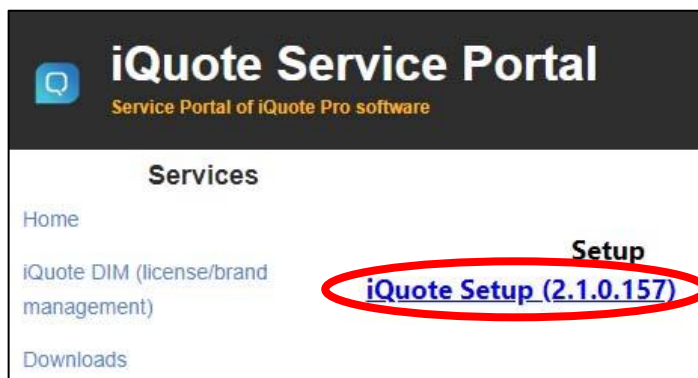
The post configuration requires **5 minutes** (check user permissions and test the installation)

The installation of the product database (also known as products updates, included price-lists, file photo/dwg/datasheet) requires few hours. This activity is possible only with a licence of the software and an usb dongle provided by the supplier of the software.

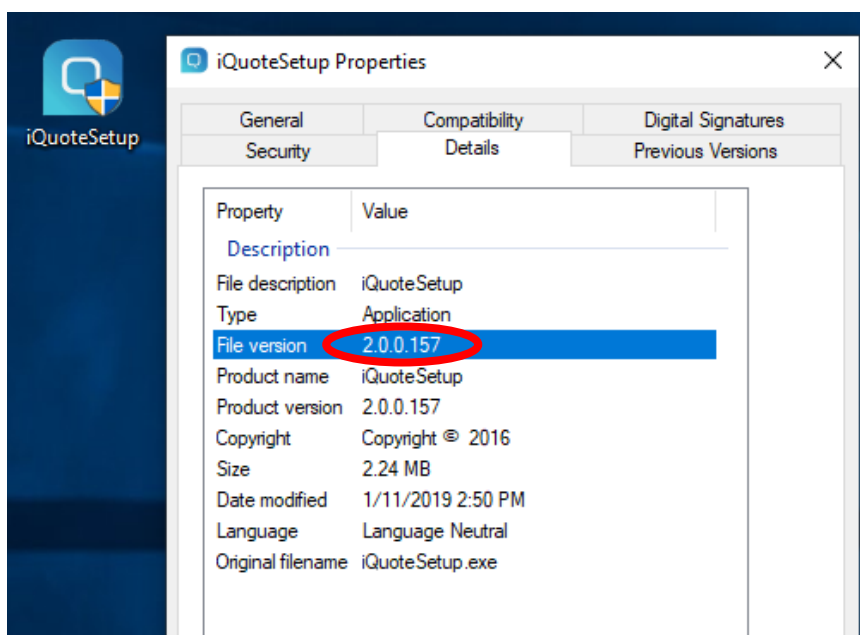


## Pre installation information

- Before starting, if you have a previous iQuoteSetup version, **check you have the last version available:** the latest version of iQuote setup is always available on the web portal <http://service.iquotepro.net>, Downloads section.
  - in web portal check the version into the bracket (in figure 2.1.0.157)

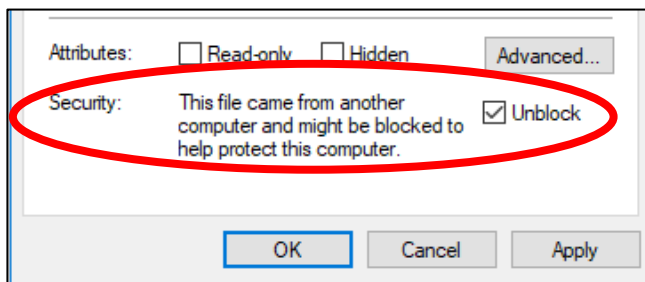


- in the properties of your "iQuoteSetup.exe" file check that the file version matches with the above one (in the figure, 2.1.0.157)





2. After the download, "Unblock" downloaded files if necessary



3. Place "iQuoteSetup unzipped folder" into your preferred place (example **C:\Temp**)
4. It is strongly recommended to install the application under default path in **C:\Program Files\**
5. Install the software **with local administrator privileges**.
6. Setup will turn on Windows features "**IIS Internet Information Services**" with the default configuration: this required Windows Update enabled, in order to download necessary installation files for these services. Then, it will create new default website "iQuote" and new FTP site "iQuoteFTP"



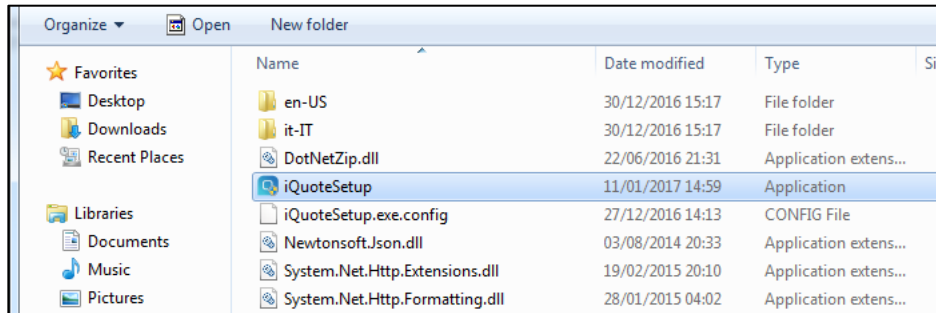
**REMEMBER:** Local Administration rights are mandatory required during all the installation

## Installation Part 1.1 – iQuote Setup

(only for standalone/server installation)

1. Start the installation by opening folder x64 (inside the directory previously copied into your preferred place, example C:\Temp) and double clicking on the iQuoteSeup.exe.

**DO NOT USE “RUN AS” COMMAND TO RUN iQuoteSetup.exe**



2. Click on “Advanced” to make particular settings or, to go on with default settings, click “Next”. Into Advanced settings you can:





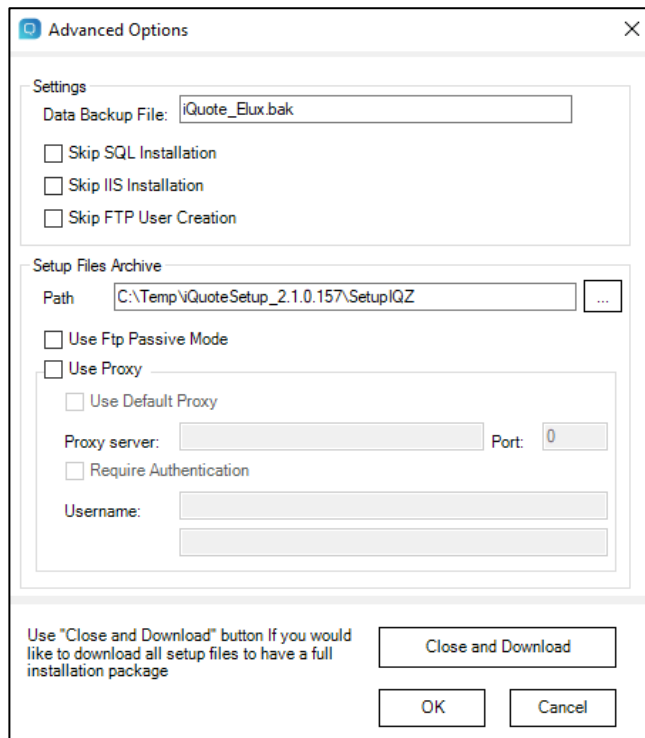
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- a. Change “Data Backup File” (for example if you are changing your pc, you have an old iQuote database to restore) typing “.bak” file name. Before to do this:
  - i. Create new folder “Database” into iQuote Setup folder, path “x64\SetupIQZ
  - ii. Copy inside new folder your “.bak” file.
  - iii. Create a “zip” of “database” folder, renaming zip file in “Data\_Database.iqz” (so removing “zip” extension). You can now delete the new “Database folder”

- b. Check “Skip SQL installation” if you want to use a pre-existing Microsoft SQL Server instance and so configuring manually (with our helpdesk) your database

- c. Check “Skip IIS installation” if you want to install website on another machine or if it is already installed

- d. Considering iQuote works with FTP authentication, setup will create a local user “Apice” that will be able to access to local FTP website. If you want to use different user (such as domain users), check “Skip FTP User Creation”

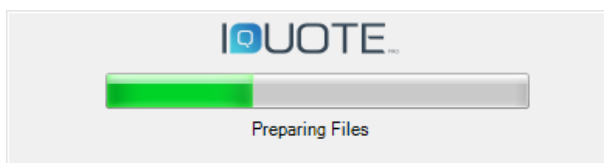


- e. Path: decide where you want to downloaded all packages (from 2GB to more than 6GB, as explained above on “Timing and extra info”). You can leave default pre-set path if you haven’t any free-space problem
- f. Depending on your network and internet connection, you can enable “Use FTP Passive mode” and/or “User Proxy” to download all packages (2GB to 6GB).
- g. Clicking on “Close and Download”, it will download immediately all the packages, more than 6GB, before installation start.

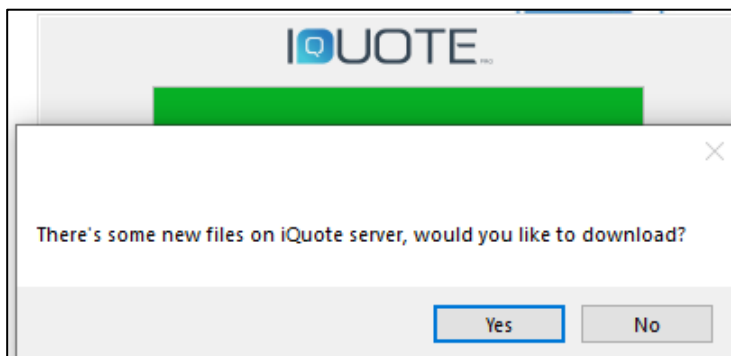
3. The wizard will now download some necessary files from internet. Time of progress is related to internet speed.



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4. If the wizard finds new files, it asks what to do with them: press “Yes”



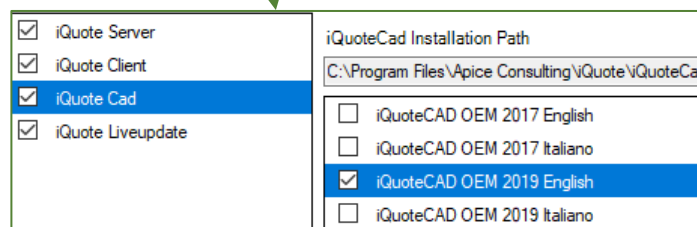
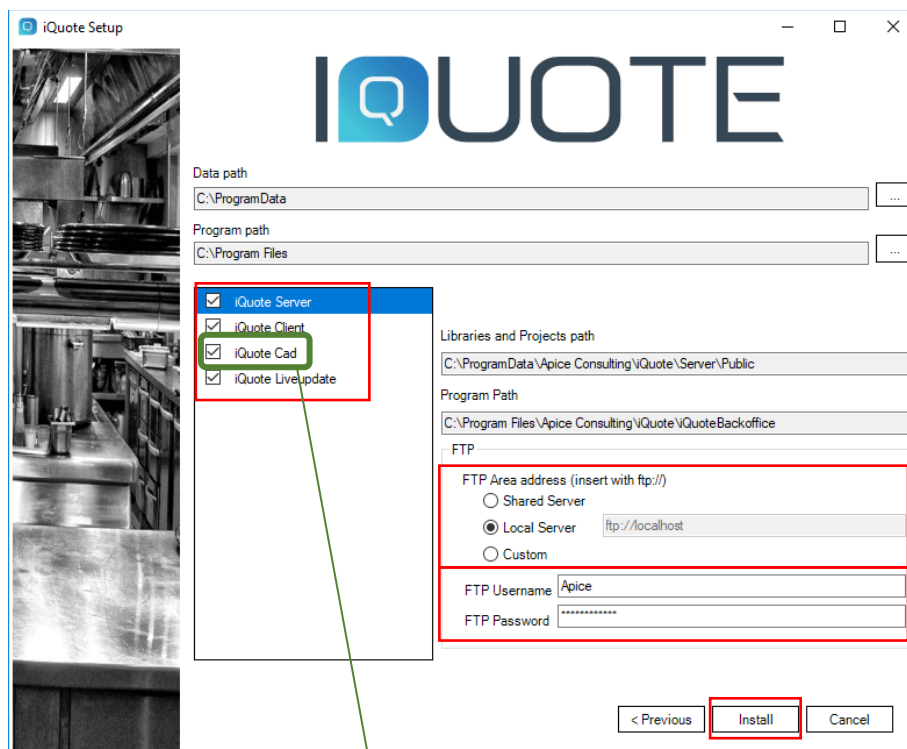
5. Accept the license agreement and click **Next**





## Installation Part 2.1 – iQuote products selection (standalone installation)

1. Select your preferred path for both Data files and Program Files.
2. Select "iQuoteServer" and "Local Server" as FTP Area address. FTP user is a system account used to access to IIS service, it is created locally in Windows system as "standard users" without any login rights. To avoid any policies problem, default data are "Apice" as user and "iQuote@27423" as password.
3. Select "iQuote Client" and "iQuote LiveUpdate". iQuote CAD depends from each user: if you are installing "iQuoteCAD OEM" version, from right subpanel check only one desired version, leaving unchecked all other versions. No more action is required; click **Install** and go to page 13 "Start installation".

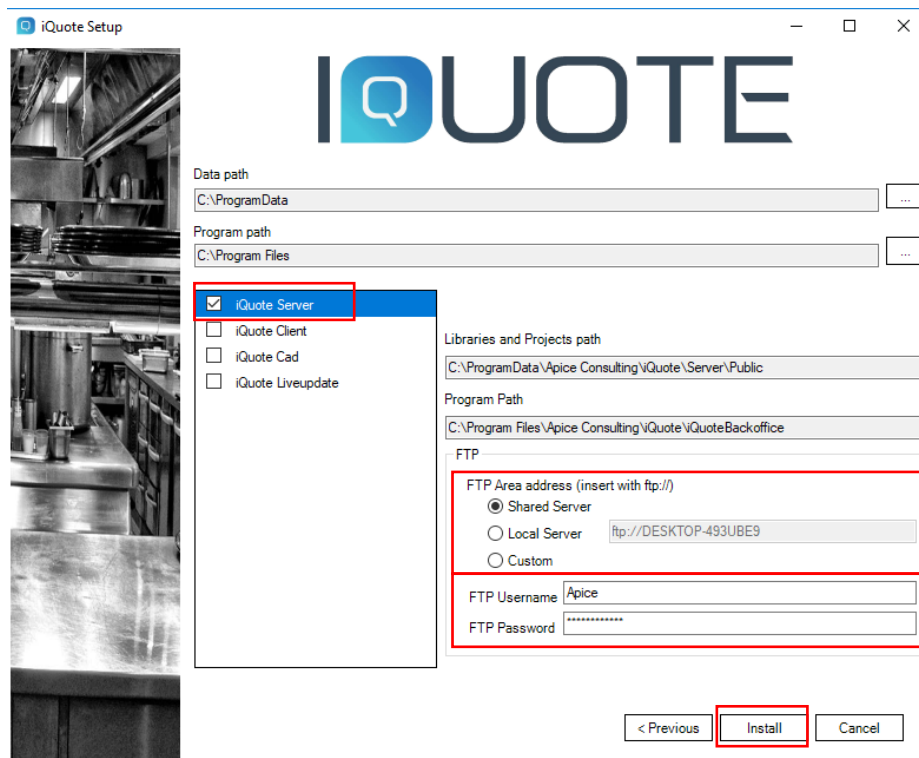






## Installation Part 2.2 – iQuote products selection (server installation)

1. Select your preferred path for both Data files and Program Files.
2. Select only "iQuote Server" and select "Shared Server" on FTP area. You can also switch to custom if the default hostname has any trouble to be shared on your network (so, for example, changing it with IP address). FTP user (default "Apice") is a system account used to access to IIS service, it is created locally in Windows system as "standard users" without any login rights. Its default password is "iQuote@27423", be sure it meets local policy: if it is not, change password here. Click **Install** and go to page 13 "Start installation".

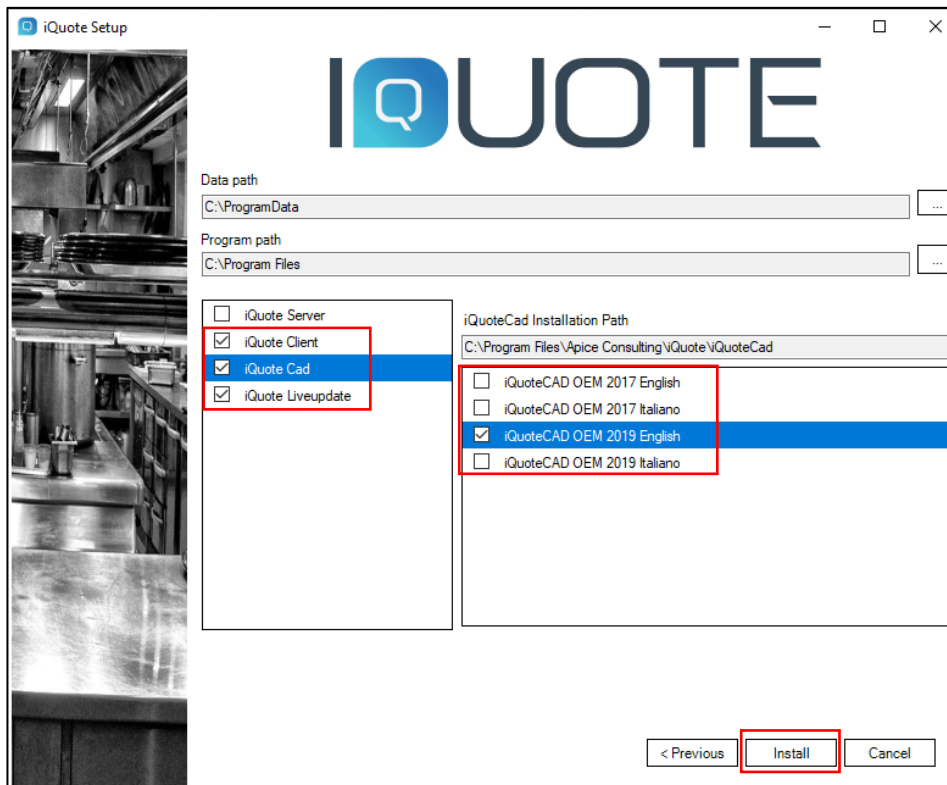


## Installation Part 2.3 – iQuote products selection (client installation)

1. Select your preferred path for both Data files and Program Files
2. Uncheck iQuote Server, select "iQuote Client" and "iQuote LiveUpdate". iQuote CAD depends from each user: if you are installing "iQuoteCAD OEM" version, from right subpanel check only one desired version, leaving unchecked all other versions. No more action is required; click **Install** and go to page 13 "Start installation".

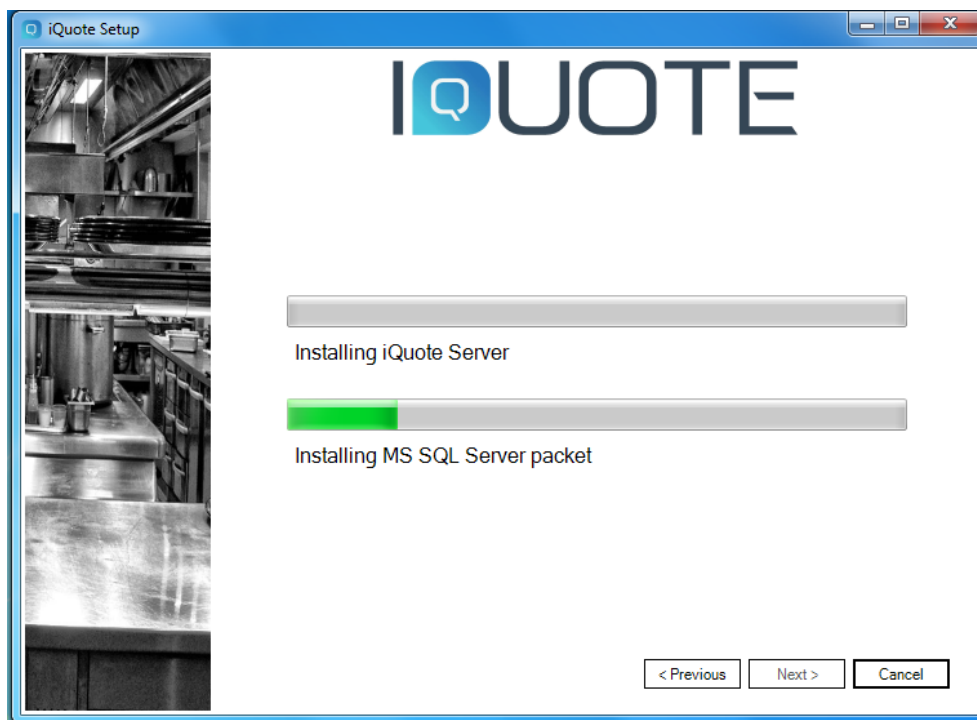


**REMEMBER:** Local Administration rights are mandatory required during all the installation



## Start installation

1. The Install Wizard will begin installing iQuotePro





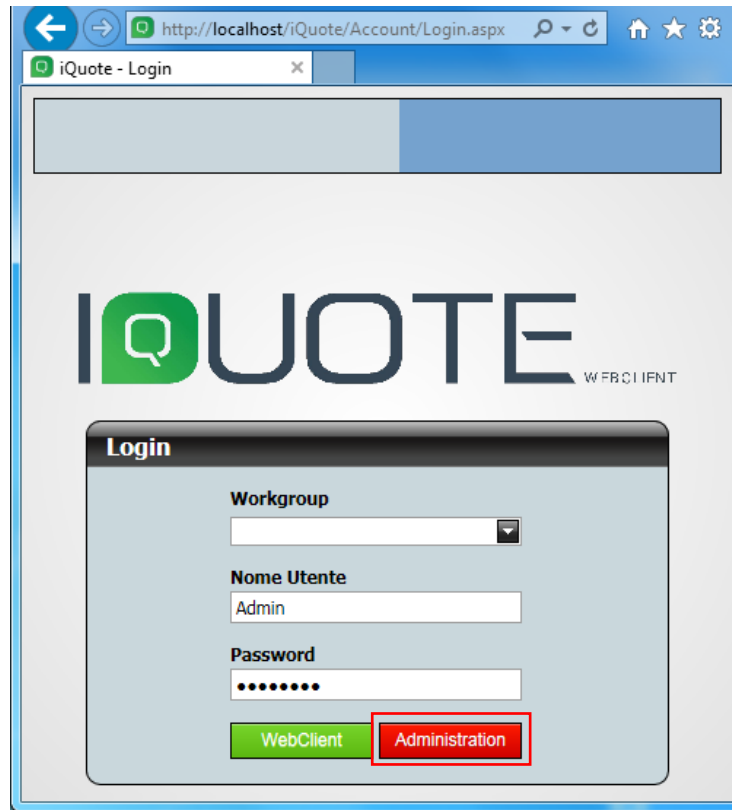
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2. Let setup work, in some process it could seem block but it is not, let it work until below screen will appear and click **Finish**



3. If you have installed "iQuoteServer" (so on standalone or server installation), it will open the iQuote Management Server (screenshot below) on the default browser (if it is not, run "iQuote Management Server" from "Start – All Programs – Apice Consulting – iQuote): insert default login, "Admin" as user and "password" as password (NB. It is case sensitive) living "Workgroup" blank and click **Administration**.

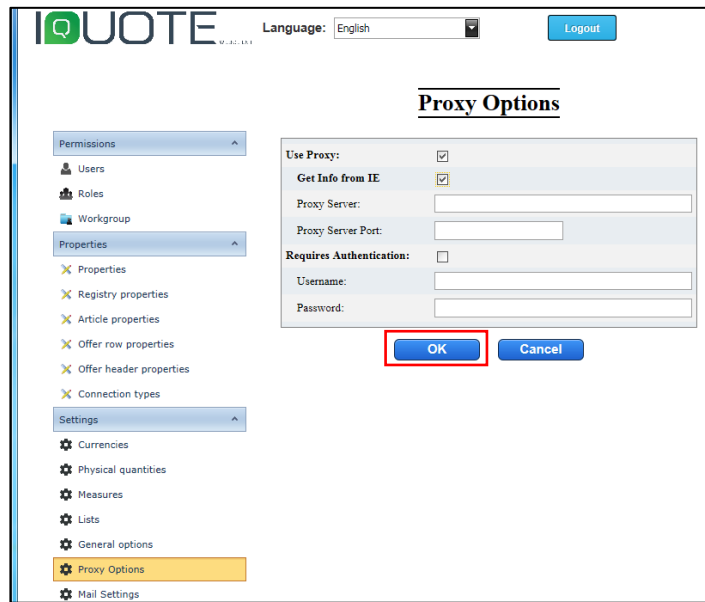
If the iQuote management Server is not opened or opens with error, contact our helpdesk service, something went wrong during installation/configuration of Microsoft IIS or Microsoft SQL server installation/configuration.



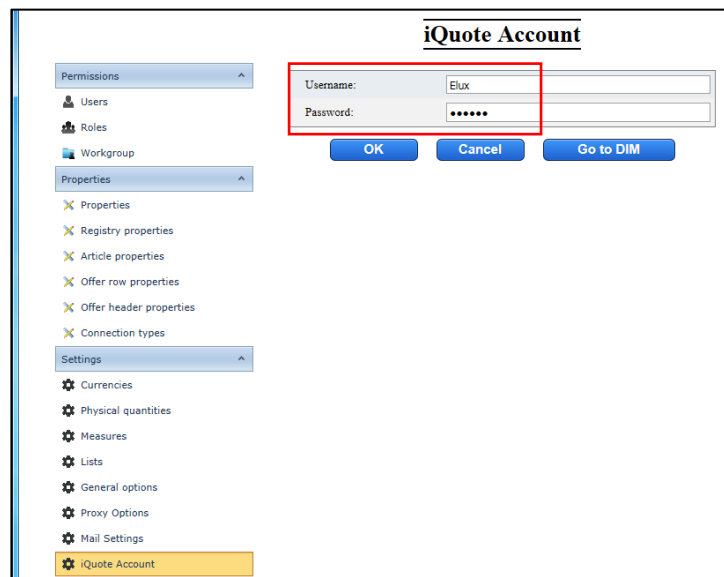
## iQuote Management Server configuration

NB: To open iQuote Management Server, refer to step 3 of previous page (11)

1. If internet connection doesn't have any proxy, skip to step 3.
2. To manage proxy authentication, go to "Proxy options", check "Use Proxy".
  - a. check "Get info from IE" to get LAN and proxy settings from Internet Explorer, then click **OK**
  - b. keeping "Get info from IE" unchecked, it is possible to insert authentication data manually, then click **OK**.



3. Go to iQuote Account, insert Username and Password (refer “Activation and startup” eMail). Click **OK**, close browser

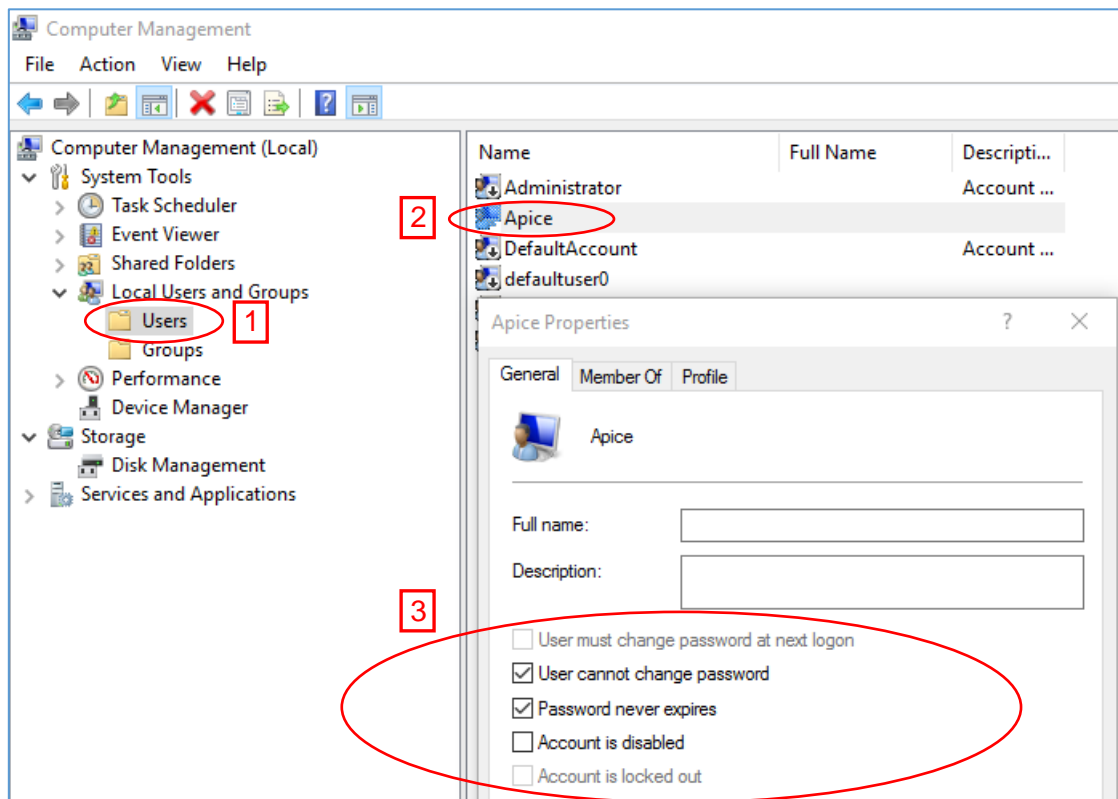


## Post installation

1. After iQuote installation, grant “read/write” permissions to end user (we recommend to group “Authenticated users”) to “C:\Program Files\Apice Consulting\” and “C:\ProgramData\Apice Consulting” (or data path selected at page 9) and all their subfolders and files for updates installation from LiveUpdate
2. Setup creates a new (local) Windows user named “Apice” (or any other user selected at page 7), mandatory to access to main FTP of IIS Service. User “Apice” is created with low privileges, so without any “login” permission too. Please be sure



the user has the following configuration: if it has not, please change like in picture below:



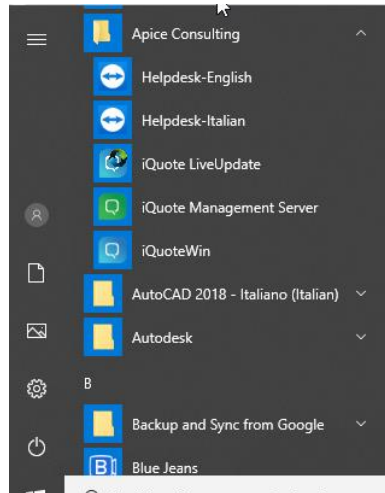


**REMEMBER:** Local Administration rights are mandatory required during all the installation

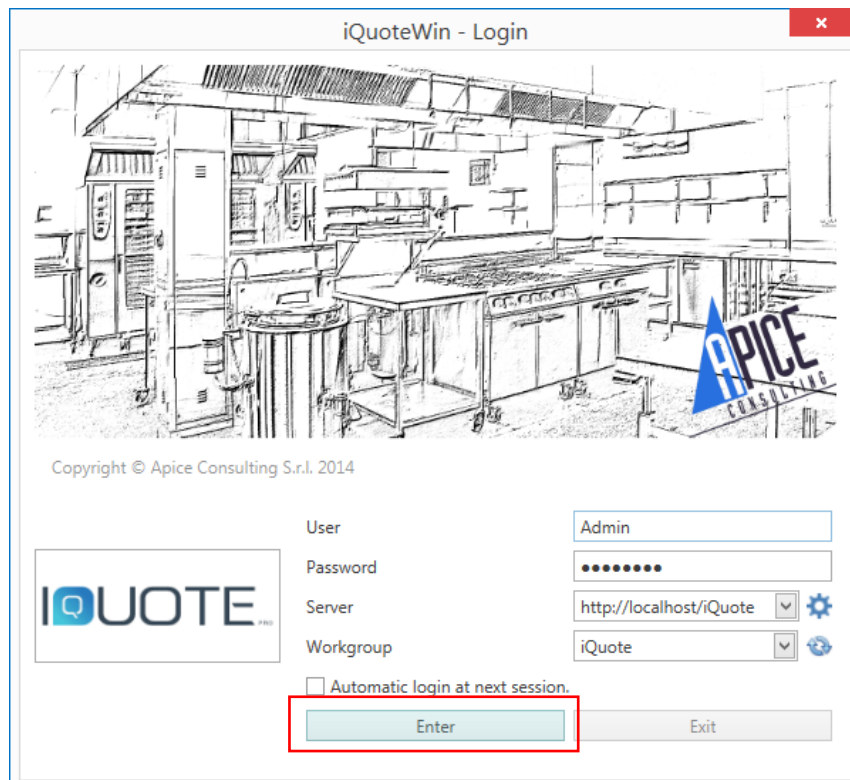
## Test the installation

Insert now the dongle USB. If you haven't it, iQuote will prompt you the temp code supplied to company reference person through "Activation and startup eMail".

With user account and standard permission, execute the software iQuoteWin from Start-All Programs-Apice Consulting-iQuote.



The software will ask to login: insert default login "Admin" "password", set Server and Workgroup like in the picture below. Then click **Enter**





The software will check the license (usb dongle) and will connect to the IIS service

*Note: Also without the usb dongle is possible to check the installation, the software will connect to IIS service and will give the possibility to work in demo mode. However, without the dongle, internet connection is mandatory.*







## Appendix A – Folders and permissions

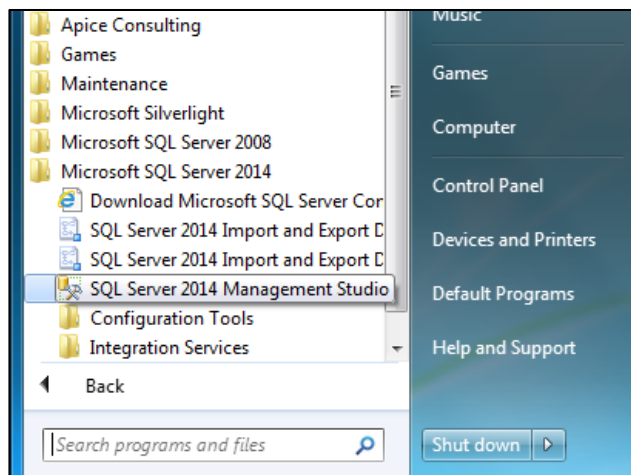
To avoid any problem during iQuote update/use, ensure “read/write” permissions for group “Authenticated users” to the following folders (with subfolders and files):

- “C:\ProgramData\Apice Consulting”
- “C:\Program Files\ApiceConsulting”
- User Temp directory (%temp%)

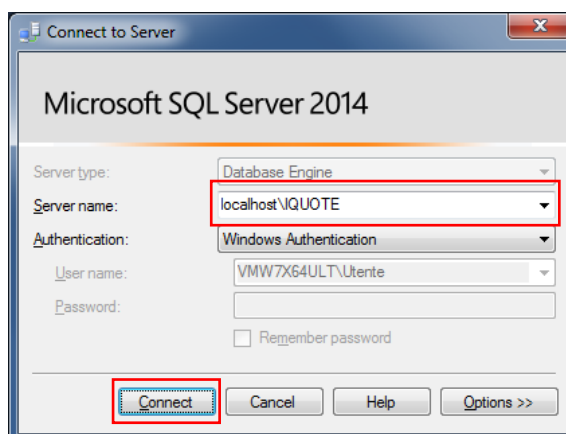
## Appendix B - Installation of iQuote on a new machine and restore manually the database and projects from the old PC

From the old computer create a backup of the sql database

1. Open Management Studio Express application

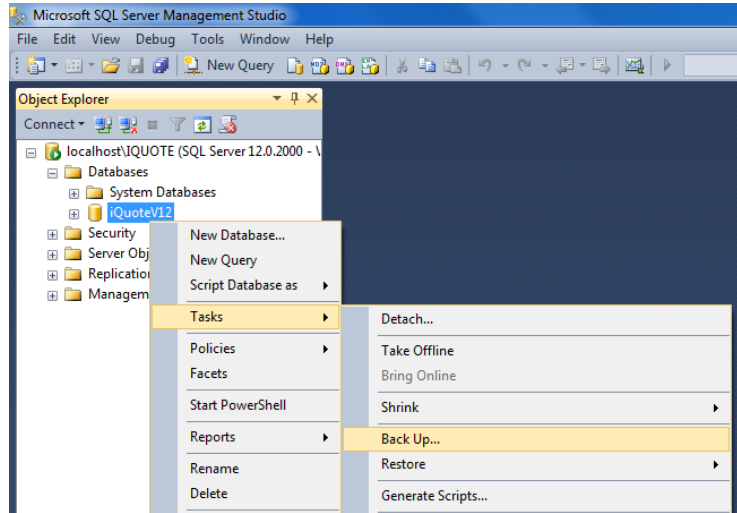


2. Connect to IQUOTE instance

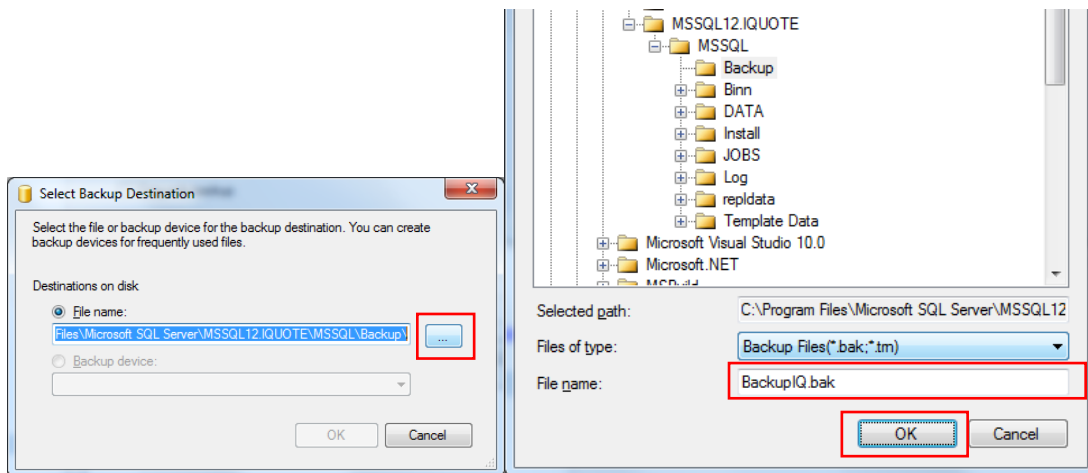
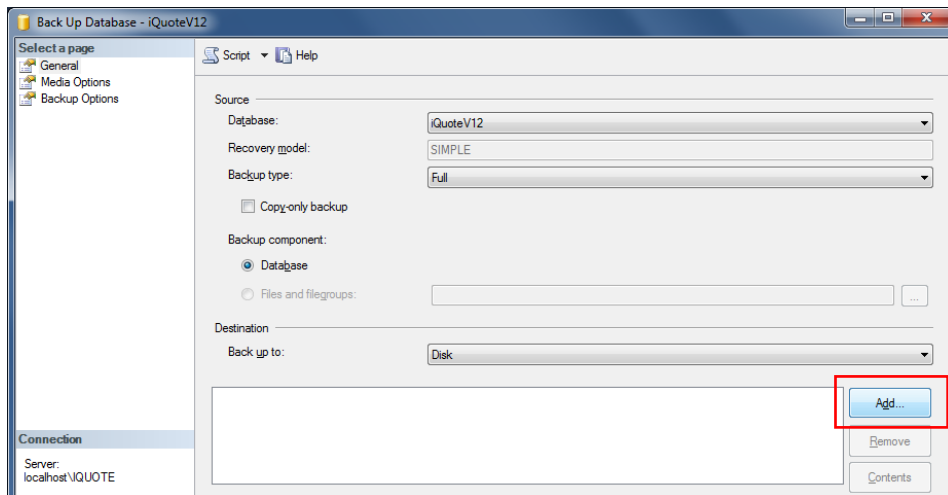




3. From Database/iQuoteV12 select Tasks and **Backup...**

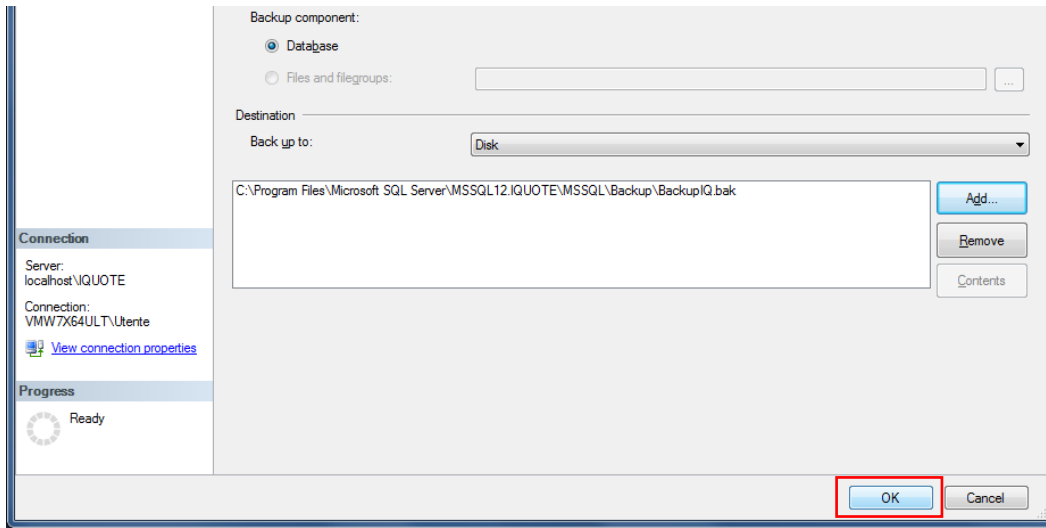


4. Select the destination folder and the assign a backupname



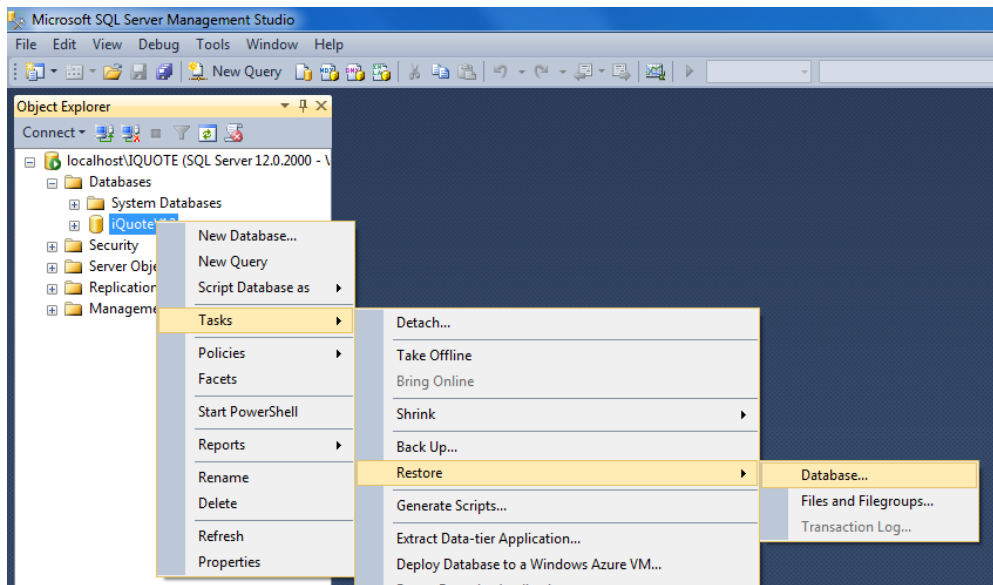


5. Start the backup



6. Copy the backup file into the new Computer and restore the file after the installation of iQuote, again with Management Studio Express application: open it and connect to IQUOTE instance like wrote for backup steps

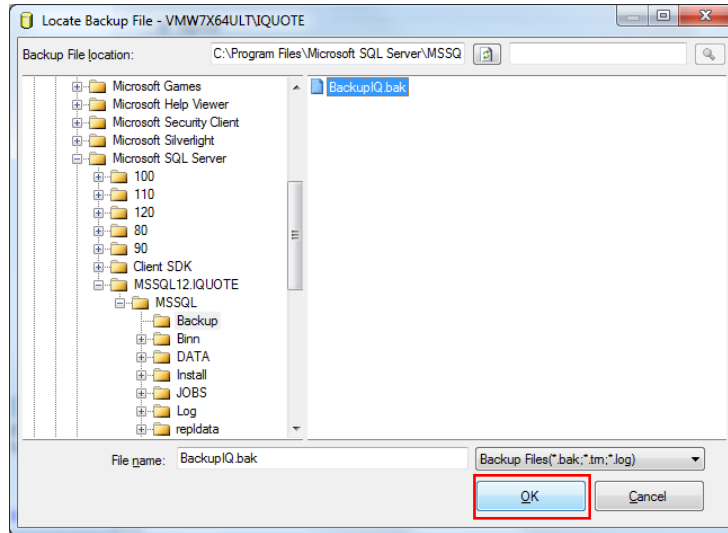
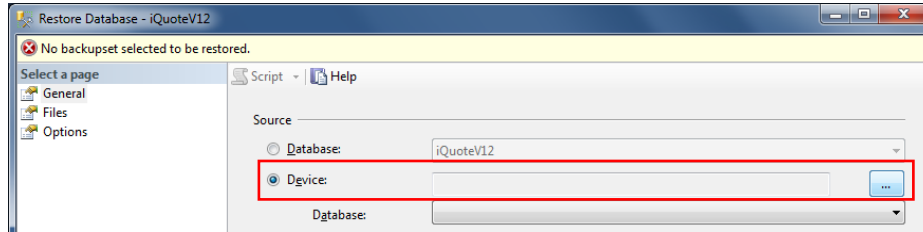
7. From Database/iQuote select Tasks, Restore and Database



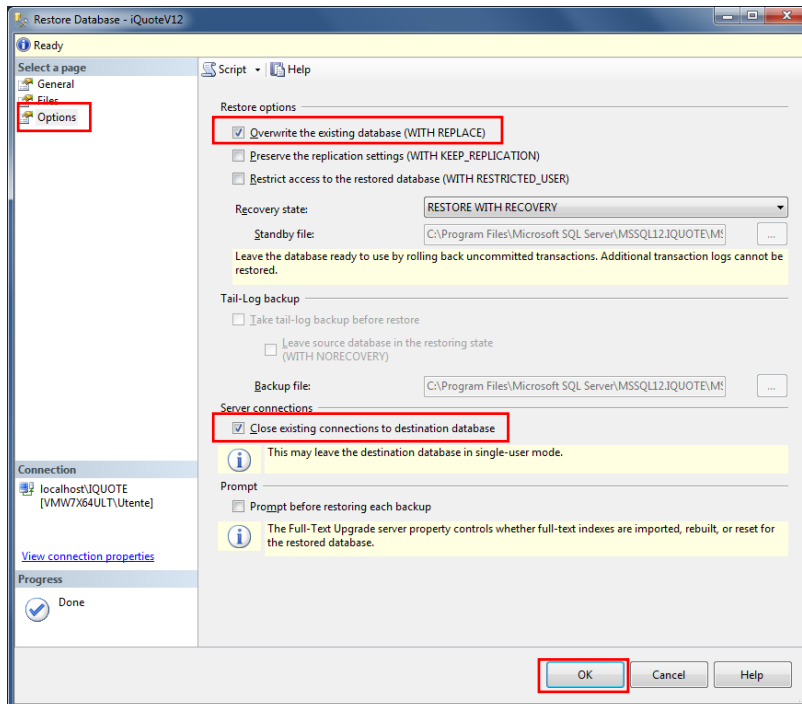


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8. Choose the file copied at step 7



9. Go to Options and check **Overwrite the existing database** and **Close existing connection to destination database**; start the restore by clicking **OK**



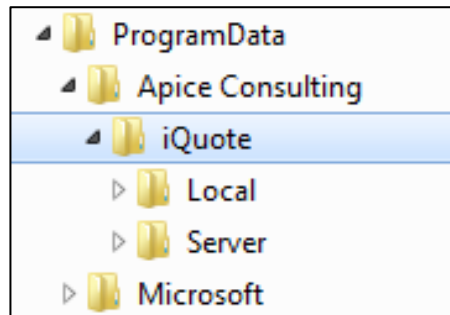


## Projects, settings and files:

Copy all contents from the old user's PC directory:

C:\ProgramData\Apice Consulting\iQuote (default path, check if it is correct on iQuote Management Server, general Options)

there are 2 main folders: Local and Server



to the new PC

C:\ProgramData\Apice Consulting\iQuote