



Installation Manual (2.1.9255)

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<u>General</u>

- 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

- 1. 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)

iQuote Ser Service Portal of iQuote Pro	vice Portal
Services	
Home	
iQuote DIM (license/brand	Setup
management)	<u>iQuote Setup (2.1.0.157)</u>
Downloads	

• 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)

unata Satura	General	Compatibility	Digital Signatures
luotesetup	Security	Details	Previous Versions
	Property	Value	
	Description -		1
	File description	iQuoteSetup	
	Туре	Application	
	File version	2.0.0.157	
	Product name	iQuoteSetup	
	Product version	2.0.0.157	
	Copyright	Copyright © 2016	
	Size	2.24 MB	
	Date modified	1/11/2019 2:50 PM	
	Language	Language Neutral	
	Original filename	iQuoteSetup.exe	







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

Attributes:	Read-only Hidden Advanced
Security:	This file came from another computer and might be blocked to help protect this computer.
	OK Cancel Apply

- 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"







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

Organize 👻 🖬 Oper	n New folder		
☆ Favorites	Name	Date modified	Type Si
🧮 Desktop	🐌 en-US	30/12/2016 15:17	File folder
🗼 Downloads	鷆 it-IT	30/12/2016 15:17	File folder
📃 Recent Places	🚳 DotNetZip.dll	22/06/2016 21:31	Application extens
	🕓 iQuoteSetup	11/01/2017 14:59	Application
🥃 Libraries	iQuoteSetup.exe.config	27/12/2016 14:13	CONFIG File
Documents	Newtonsoft.Json.dll	03/08/2014 20:33	Application extens
🚽 Music	System.Net.Http.Extensions.dll	19/02/2015 20:10	Application extens
Pictures	System.Net.Http.Formatting.dll	28/01/2015 04:02	Application extens

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









- 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

O Advanced Options	×
Settings Data Backup File: IQuote_Bux.bak	
Skip FTP User Creation	
Setup Files Archive	
Path C:\Temp\iQuoteSetup_2.1.0.157\SetupIQZ	
Use Ftp Passive Mode Use Proxy Use Default Proxy	
Proxy server: Port: 0 Require Authentication	
Username:	
Use "Close and Download" button If you would like to download all setup files to have a full installation package OK Cancel	4

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.









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.
- Select "iQuote Client" and "iQuote LiveUpdate". iQuote CAD depends from each user: <u>if you are installing "iQuoteCAD OEM" version, from right subpanel check only</u> <u>one desired version</u>, leaving unchecked all other versions. No more action is required; click **Install and go to page 13 "Start installation"**.

iQuote Setup	Q	UOTE
	Data path C∴Program Data Program path C∴Program Files ✓ iQuote Server ✓ iQuote Client ✓ iQuote Client ✓ iQuote Liveupdate	
		< Previous Install Cancel
 ✓ iQu ✓ iQu ✓ iQu ✓ iQu 	iote Server iote Client iote Cad iote Liveupdate	iQuoteCad Installation Path C:\Program Files\Apice Consulting\iQuote\iQuoteCat iQuoteCAD OEM 2017 English iQuoteCAD OEM 2017 Italiano iQuoteCAD OEM 2019 English iQuoteCAD OEM 2019 Italiano







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".

iQuote Setup		– 🗆 X
		UOTE
AAMA	C:\ProgramData	
	Program path	
	C:\Program Files	
	IQuote Server IQuote Client IQuote Client IQuote Cad IQuote Liveupdate	Libraries and Projects path C:\Program Data\Apice Consulting\Quote\Server\Public Program Path C:\Program Files\Apice Consulting\Quote\QuoteBackoffice FTP FTP Area address (insert with ftp://)
		< Previous Install Cancel

Installation Part 2.3 – iQuote products selection (client installation)

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







回 iQuote Setup			– 🗆 X
	Data path	UOT	Έ
	C:\ProgramData		
	Program path		
	C:\Program Files		
	iQuote Server	iQuoteCad Installation Path	
Property in the second	iQuote Client	C:\Program Files\Apice Consulting\iQuote\i	QuoteCad
	✓ iQuote Cad	iQuoteCAD OEM 2017 English	
	✓ iQuote Liveupdate	iQuoteCAD OEM 2017 Italiano	
<u>un</u> sa sa		iQuoteCAD OEM 2019 English	
		iQuoteCAD OEM 2019 Italiano	
E ENI			
		< Previou	is Install Cancel

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**



 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.





← → □ http://	/localhost/iQuote/Account/Login.aspx 🛛 🖓 🕆 🔅
🖸 iQuote - Login	×
	WEBGLIENT
Login	
	Workgroup
	Nome Litente
	Admin
	Password
	•••••
	Administration

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**.







	Language: English	Logout
	_	Proxy Options
Permissions A	Use Proxy:	N
🚨 Users	Get Info from IE	
🏦 Roles	Proxy Server:	
🙀 Workgroup	Proxy Server Port	
Properties ^	Requires Authentication:	
🔀 Properties	Usemame:	
🔀 Registry properties	Decements	
🔀 Article properties	Fassword.	
🔀 Offer row properties		OK Cancel
🔀 Offer header properties		
🔀 Connection types		
Settings ^		
Currencies		
🏟 Physical quantities		
🇱 Measures		
🇱 Lists		
General options		
2 Proxy Options		
🇱 Mail Settings	-	

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

		iQuote Account		
Permissions	^	Username:	Elux	
🚨 Users		Password:		
🏙 Roles				
📷 Workgroup		ОК	Cancel	Go to DIM
Properties	~			
🔀 Properties				
🗙 Registry properties				
🔀 Article properties				
🔀 Offer row properties				
🔀 Offer header properties				
🔀 Connection types				
Settings	^			
Currencies				
Physical quantities				
🗱 Measures				
🗱 Lists				
General options				
Proxy Options				
🗱 Mail Settings				
🗱 iQuote Account				

Post installation

- 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
- 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:

🕌 Computer Management		
File Action View Help		
🗢 🄿 🙍 📰 🗙 🖾 🛃 🗊		
 Computer Management (Local) System Tools Task Scheduler Event Viewer Shared Folders Local Users and Groups Groups Performance Device Manager Storage Disk Management Services and Applications 	Name Full Name Administrator Anice Apice Apice Apice Properties Apice General Member Of Profile Apice Full name: Description: Description: User must change password at next logon User cannot change password Password never expires Account is disabled Account is disabled	Descripti Account ? ×
	Account is locked out	







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**





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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

Connect to Server			
Microsoft SQL Server 2014			
Server type:	Database Engine 👻		
Server name:	localhost\IQUOTE -		
Authentication:	Windows Authentication 👻		
<u>U</u> ser name:	VMW7X64ULT\Utente		
Password:			
	Remember password		
Connect Cancel Help Options >>			







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



4. Select the destination folder and the assign a backupname

a serect a page			
General	Script 🔻 🚺 Help		
Media Options			
Backup Options	Source		
	Database:	iQuoteV12	▼
	Recovery model:	SIMPLE	
	Backup type:	Full	
	Copy-only backup		
	Backup component:		
	Database		
	Files and filegroups:		
	Destination		
	Back up to:	Disk	
			Add
Connection			Remove
Server: localhost\IQUOTE			Contents
: Backup Destination he file or backup device for the devices for frequently used files	backup destination. You can create	MSSQL12.IQUOTE	a .0
: Backup Destination he file or backup device for the devices for frequently used files tions on disk	backup destination. You can create	MSSQL12.IQUOTE	a .0
: Backup Destination he file or backup device for the devices for frequently used files tions on disk Ele name:	backup destination. You can create	MSSQL12.IQUOTE MSSQL Backup Binn DATA DATA DATA DATA DATA Cog Template Dat Microsoft Visual Studio 10 Microsoft Neural Selected gath: C:\Program	a .0 1 Files\Microsoft SQL Server\MSSQL
: Backup Destination he file or backup device for the devices for frequently used files tions on disk Ele name: eMicrosoft SQL Server/MSSQI Perform devices	backup destination. You can create , .12.IOUOTE\MSSQL\Backup)	MSSQL12.IQUOTE MSSQL Backup Binn DATA DATA DATA DATA DATA DATA DATA Cog Template Dat Microsoft Visual Studio 10 C:VProgram Files of type: Backup File	a .0 1 Files\Microsoft SQL Server\MSSQL es(*.bak;*.tm)
: Backup Destination he file or backup device for the devices for frequently used files tions on disk Ele name: Microsoft SQL Server MSSQI Backup device:	backup destination. You can create a. 122/0UOTEMISSOL/Backup)	MSSQL12.IQUOTE MSSQL Backup Binn DATA DATA DATA DATA DATA Data JOBS DOBS	a .0 1 Files\Microsoft SQL Server\MSSQL es(*bak;*tm) bak







5. Start the backup

	Backup component:		
	Oatabase		
	Files and filegroups:		
	Destination		
	Back up to:	Disk	•
	C) Brown Fley Misson & COL Course		
	C:\rrogram riles \MICrosoft SQL Server\N	1554L12.14UU1E111554L1Backup1BaCKUp14.BaK	A <u>d</u> d
Connection			Remove
Server: localhost\IQUOTE			Contents
Connection: VMW7X64ULT\Utente			
View connection properties			
Progress			
Ready			
			OK Cancel

- 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

Microsoft SOL Server Management Studio			
File Edit View Debug Tools Window Help			
i 🛅 • 🖾 • 💕 💂	🗿 🔛 New Query 📑 📸 🗄	3 😘 X 🖬 🕮 ↔ - ↔ - ,⊒ - 🖳 XX ♦	•
Object Explorer Connect · 2 2 2 1 Databases · Databases · System · Security · Server Obje · Replication			
⊕ 🞑 Manageme	Tasks Policies Facets Start PowerShell Reports	Detach Take Offline Bring Online Shrink Back Up	
	Rename Delete Refresh Properties	Restore Generate Scripts Extract Data-tier Application Deploy Database to a Windows Azure VM	Database Files and Filegroups Transaction Log





Sel



8. Choose the file copied at step 7

Restore Database ·	- iQuoteV12		
No backupset sele	cted to be restored.		
ect a page General Files Options	Script ~ I Help Source	iQuoteV12	
	Uccate Backup File - VMW7X64ULTVI	QUOTE	
	Backup He location: C. (*rogr C. (*rogr Microsoft Games Microsoft Security Clerit Microsoft Solution Microsoft SQL Server Microsoft SQL Server Microsoft SQL Server Clerit SDK Clerit SDK Microsoft SQL Microsoft SQL Micro	BackupIQ bak	
	File <u>n</u> ame: BackuplQ.bak		Backup Files("back;"tm;"log) QK Qancel

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

🎄 Restore Database - iQuoteV12		
() Ready		
Select a page General Elec Options	Script • C Help Restore options Ø Overwrite the existing databa Preserve the replication settin Bestrict access to the restore Recovery state: Standby file:	ISE (WITH REPLACE) ngs (WITH KEEP_REPLICATION) d database (WITH RESTRICTED_USER) RESTORE WITH RECOVERY C\Program Files\Microsoft SQL Server\MSSQL12.IQUOTE\M!
	Leave the database ready to use restored. Tail-Log backup	by rolling back uncommitted transactions. Additional transaction logs cannot be
Isake tail-log backup before restore Leave source database in the restoring state (WTH NORECOVERY)		
	Backup file: Server connections ✓ Close existing connections to	C:\Program Files\Microsoft SQL Server\MSSQL12JQUOTE\M:
Connection	i i i i i i i i i i i i i i i i i i i	ation database in single-user mode.
Iocalhost\JQUOTE [VMW7X64ULT\Utente]	Prompt Prompt before restoring each The Full-Text Upgrade se the restored database	n backup rver property controls whether full-text indexes are imported, rebuilt, or reset for
View connection properties	Contractioned database.	
Progress		
Oone Done		
		OK Cancel Help







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, genral Oprions)

there are 2 main folders: Local and Server



to the new PC C:\ProgramData\Apice Consulting\iQuote

