



FAQ - How do I get started with QDMS?

Question

How do I get started using QDMS?

Answer

The purpose of this FAQ is to guide a customer through the minimum steps to install QDMS, Install a Custom Transmittal, and to setup their first live project. The FAQ covers:

- A. System Requirements:** What hardware and operating system you will need.
- B. Installation:** The Installation instructions for QDMS.
- C. Configure your workstation:** The first things to do after installation is complete.
- D. Creating and Setting the Owing Company:** How to install your Custom Transmittal.
- E. Installing your QDMS Transmittal:** How to install your Custom Transmittal.
- F. Moving QDMS to a server:** How to configure QDMS for network installations.
- G. Registering QDMS:** How to register the program.
- H. Creating your Live Project:** How to create your live project.
- I. What Next?:** Setting up an Address book, Users, Configuration tables etc.

Note: Prior to installation you should 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 QA Software PRIOR to following the steps below.

A. System Requirements

The system requirements for running QDMS are:

Hardware/Software	Minimum Requirements	Recommended Requirements
Computer/Processor	Pentium 250	Pentium 800
Memory (RAM)	64 MB	128 MB
Available Hard Disk Space	30 MB	80 MB
Display	800 x 600 16 Bit	1024 x 768 16 Bit
Operating System	Windows 98, Windows Me, Windows 2000, Windows NT, Windows XP, Windows Vista	Windows XP, Windows Vista



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B. Installation - Installing the QDMS Application

1. Insert the QA Software CD and if it auto loads, simply click the **Install QDMS** option at the QA Software menu and follow the installation instructions. QDMS will be installed in C:\Qasoft\Qdms\ by default.
2. A short cut icon on your desktop will have been created to access C:\Qasoft\Qdms\Qdms.exe

If the CD does not auto load:

3. Using Windows Explorer locate the D:\Qdms\Setup folder and double click on QDMS.msi
4. Follow the install instructions as above.

If you downloaded QDMS from the Internet:

5. Using Windows Explorer double click on the QDMS.msi file you downloaded.
6. Follow the install instructions as above.

C. Configure your work station




1. If your monitor is not already set to a **minimum** display of 1024 x 768 pixels, you should change it to this setting before proceeding. To do this, right click on any blank space on your desktop, select Properties and then the Settings tab. Adjust the screen resolution to 1024 x 768 pixels.
2. Create a shortcut icon on your desktop (if one was not automatically created during installation) to access the QDMS.EXE (Located by default in the folder C:\Qasoft\Qdms\)

D. Creating & Setting the Owing Company

D.1 Run QDMS

1. Run QDMS by double clicking the QDMS icon on your desktop. (Or use Start | Programs | QA Software | QDMS).
2. At the login screen, the User ID = QA and the password is also QA.
3. Select the Demonstration project by double clicking on the Project Name and you will be located at the Dashboard. This is the starting point for all QDMS actions.

D.2 Create the Owing Company

1. From the **View** menu, select **Address Book**
2.  Above the drop down listing under Company ID (at the top centre of the screen) is a button with three dots. Click on this button to get into the Company listing.
3.  Click on the **Create a new Company** button to bring up the Add Company window.
4. Enter an appropriate ID for your company (eg QAS for QA Software).
5. Enter the full company name in the Title field.
6. Click the **Add** button.
7.  Close the Company screen using the **Close** button.
8. Close the Address Book screen using the **Close** button.



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D.3 Set the Owing Company

1. From the **Tools** menu, select **Options**.
2. Click on the **Program Defaults** Tab.
3. Click on the **Edit** button on the toolbar.
4. Select your company from the drop down listing against **Owing Company**.
5. Click the **Save** button on the toolbar and then click the **Close** button.



E. Installing your Custom Transmittal

Customers are nearly always provided with a custom transmittal format for use with their QDMS Installation. To install your custom transmittal format:

Unzip the file provided to you (that contains your custom transmittal format) into the \Qasoft\Qdms folder.

1. Run QDMS (if you are not already logged in) login and select any project.
2. Follow Steps 1 to 3 in section E.3 above.
3. In the fields captioned **Custom Transmittal Type 1** and **Custom Transmittal Type 2**, enter the name of your custom transmittal format (eg ZQASTRM) which will have been provided to you.
4. Follow Step 5 in section E.3 above.

F. Moving QDMS to the server.

QDMS is normally located on a server drive so all users connected to the network can have access. This requires that all clients are mapped to the same drive letter on the server. Eg Drive K.

Assuming you have followed the installation instructions for QDMS in Section C.2 above, you can now move the QDMS Installation to the Server by simply copying the QASOFT folder from the C: drive to the destination server drive.

All PC's requiring access to QDMS on the server other than the one on which you originally installed QDMS in Section C.2 above need to be setup as follows (perform the steps below in each PC):

- (a) Install the QA Software System Files (QASYS). The QASYS Installer is called QASYS.MSI and is available either from the QA Software CD Rom (D:\Qasys folder) or by downloading from www.qa-software.com. Simply run the QASYS.MSI file by double clicking on it.
- (b) Create a short cut to the QDMS EXE on the server. See section D Item 2 above. The QDMS.EXE on the server will be located for example in the K:\Qasoft\Qdms folder.
- (c) Register QDMS (required for per seat licensing only). See Section H.1 below.

G. Registering QDMS

QA Software products are normally licensed:

- Either to specific PCs that will be able to access the software OR
- On a Concurrent User basis



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G.1 Registering QDMS for Per Seat Licensing

With **Per Seat** Licensing, each PC accessing QDMS must be registered. For this reason it is essential for you to go around to every PC 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.

Obtaining a Registration key:

1. From the **Help** menu, select **Register Program**.
2. Complete the **Name** and **Organisation** fields. Note that the Organisation must be selected from the QDMS Address book. If your company is not already listed in the Address book you must add it. See Section E2 above.
3. Select the **Contact Information** Tab and complete the contact information that QA Software will use to communicate with you. Note that the License number is generally provided at the time QDMS is supplied to you.
4. Click the **Add to Log** button. If you have been to every PC you are registering, go to step 6.
5. Go to the next computer and return to step 1.
6. Click either **Print Log** and attach it to your purchase order; or click **Email Log** to electronically mail the log to QA Software at sales@qa-software.com.

Note: If you only have a couple of computers to register, you may want to call QA Software and register each PC over the phone by calling +61 (3) 8379 0000.

Entry of Registration Key

Once QA Software have received your purchase order and your **registration log**, they will either send you a printed Registration Details sheet via mail/fax or send you an updated registration log via email.

If you have received a printed registration details sheet:

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

If you have received a registration log by email:

1. Copy the attached file to your CONFIG Directory (usually \Qasoft\Qdms\Config).
2. Go around to each PC you placed an order for and enter the registration screen.
3. Click **Register**

G.2 Registering QDMS for Concurrent User Licensing

With **Concurrent User Licensing**, the system can be registered from any PC set up to access the system. Hence the following steps can be performed from any PC and need only be done once.



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Obtaining a Registration key:

1. From the **Help** menu, select **Register Program**.
2. Select **Concurrent User** as the **License Type**.
3. Complete the **Name** and **Organisation** fields. Note that the Organisation must be selected from the QDMS Address book. If your company is not already listed in the Address book you must add it. See Section B above.
4. Select the **Contact Information** Tab and complete the contact information that QA Software will use to communicate with you. Note that the License number is generally provided at the time QDMS is supplied to you.
5. Copy and paste the User Reg No. in to an email and send the email to sales@qa-software.com.

Note: You can also call QA Software and register over the phone by calling +61 (03) 8379 0000.

Entry of Registration Key

Once QA Software have received your purchase order and your **User Reg No.**, they will either send you the registration key required encrypted for the number of concurrent users.

6. Repeat steps 1 and 2 above and enter the Registration key provided.
7. Click **Register**

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:

1. From the **File** menu select **New Project** and click **Next** at the Welcome screen.
2. Enter the Project Number and Title and click **Next**.
3. At the Data Transfer screen, choose the **Do not populate** option so that you will create a completely empty first project.
4. 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.



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



1. From the **Tools** menu select **Security – Users and Projects**.
2. 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.

3. 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.
4. 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 miscellaneous 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.

Further information on issue

For further information, please contact QA Software Pty Ltd.

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