Estimate 20.2 and later

Installation Guide

InEight®
ESTIMATE

Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	01-DEC-2020	Initial publication

Contents

Estimate System Requirements

Listed on our support site are the **Compatibility Guide** and **Minimum System Requirements** guide. If you need to review those documents at any time, log onto the support site.

Any software versions not listed on those articles are to be assumed incompatible with Estimate unless explicitly stated elsewhere in the InEight software documentation.

> **NOTE:** Estimate will not function on any Home Editions of MS Windows, nor any version of Apple Mac OS.

Installing Estimate

Verifying the new Estimate Version

Before you install the latest version of Estimate, you will want to confirm you are installing your company's recommended version of Estimate.

1. Select the **System** tab.
2. Select the **About Estimate** option under the **Help** section.

Planning the Estimate Installation

To install Estimate, you must determine the client and server components necessary. You will also need to determine where the components will reside on the servers and workstations. Standalone installations reside on a single workstation. Smaller network installations typically employ one or a few servers along with a collection of workstations, each supporting one client. Large Enterprise installations require numerous, dedicated servers determined by CPU, network, database and storage needs. Most server components must be installed on systems that reside on a single, protected network. A few server components interact with workstations located across LAN/WAN boundaries. Installation of these components requires extra diligence considering system and network traffic exposure.

Administrative credentials are required to install, repair or upgrade any Estimate component.

Product licensing controls how modules operate but does not limit installation. Activation or changes to licensing may require administrative elevation. It is recommended that one obtain suitable licensing prior to starting the installation process.

Client Applications

Estimate Standalone Client - An isolated client whose executables and data reside on a single workstation. Standalone installation includes an option that may be used to install SQL Server Express Edition. While a more capable installation of SQL Server may be substituted, it is typically not necessary. Standalone clients do not interact with network-based Estimate services. A minimum standalone installation consists of 1) the Standalone Client and 2) Microsoft SQL Server Express. One host running Windows Professional is required.

Administrators should understand that the Standalone and Network Client installations are just two modes of operation. Differences lie in where user data is located and how that data may be shared. In the case of Standalone operation, all data and licensing must be constrained to the system where the client is installed. No user data is shared or synchronized.

CAUTION:	Diligence must be exercised when transitioning a workstation between Network and Standalone modes of operation. The SQL Server instances involved inherently differ. User data that resides on one SQL Server instance must be manually taken offline, moved and later returned by a system administrator. Estimate makes no provisions for synchronizing user data during such changes. Incorrect actions taken may lead to a loss or overwrite of critical data. There is no magic undo pill, but Estimate does offer backup and archival functionality that one should always use before venturing down this path.

One or both of the following are required for multi-user, Estimate implementations:

- **Network Client** is a full installation on each user's workstation, interacting via one Estimate Server.
- **Remote Client** fetches and dynamically installs Network client executables from one or more Estimate Servers upon Remote client launch. If multiple servers are employed, they may be different versions of InEight Estimate.

Estimate Network Client - A full, client whose purpose is to interact with Estimate Server and License Server, accessing advanced functionality and sharing data with other clients. Network Client installations do not need SQL Server locally installed on the client workstation. As such, no option to install SQL Server Express is provided when installing the Network Client.

User data resides with the Estimate Server or on a dedicated SQL Server accessed by Estimate Server. The Network Client never directly interacts with SQL Server.

Network Clients authenticate with the Estimate License Server (a Windows Service) upon launch. A minimum network installation consists of 1) the Network Client, 2) Estimate Server, 3) Estimate License Server and 4) Microsoft SQL Server. Two to four hosts (or more) running Windows Professional or Server are required.

Server Applications

Estimate Server - Facilitates collaborative use of Estimate clients. Interacts with SQL Server and exposes Estimate clients to advanced functionality in a network environment. Network traffic to and from Estimate Server is not encrypted nor has Estimate Server been hardened to support WAN-based operation. It must be installed on a host that resides entirely within a protected LAN.

License Server - Facilitates management and distribution of Estimate module licenses when running the Estimate application in a network environment. Network traffic to and from Estimate License Server is not encrypted nor has Estimate License Server been hardened to support WAN-based operation. It must be installed on a host that resides entirely within a protected LAN.

NOTE:	It is recommended that the Estimate Server and License Server be installed on a dedicated host to achieve optimal performance.

What You Will Need

In addition to the Estimate installation package, what you'll need depends upon the nature of your license, whether you'll be installing in a Standalone, Small Network or Enterprise network environment. Enterprise installations can be quite complex and are not discussed in this document.

NOTE:	The Estimate Server is also required for Primavera Integration, Mobile Timesheets, and the Data Warehouse.

When installing the Estimate Server, you will have the option to install SQL Server 2014 Express Edition as the database for Estimate. You also have the option to not install SQL Server 2014 if you intend to use an installation of the full SQL Server for Estimate. It is recommended that the Estimate Application Server be a dedicated server for the Estimate application to achieve optimal performance.

Your client workstations and servers must meet or exceed the minimum system requirements. To view the minimum system requirements, visit the support site and review the **Minimum System Requirements** document.

Standalone Installation

- Estimate Client (Standalone)

Small Network Installation

- Estimate Server
- License Server
- Estimate Client (Network)

Enterprise Installation

- Estimate Server
- License Server
- Estimate Client (Network or Remote)

Installing Estimate Client and Server Applications

To Install the Estimate Server application:

NOTE:	When installing the server application, security permissions for the INEIGHT ESTIMATE folder in the installation path (e.g., *C:\Program Files\InEight\InEight Estimate*) are automatically set to grant **full control** to all authenticated users.

1. Launch the **Estimate** installer downloaded from the InEight website.
2. At the **User Account Control** screen, click **Yes** to allow the InEight Estimate application to make changes to your computer.
3. On the **Installation Package** screen, click the **Install** button to continue.
4. Click **Install Estimate** to continue.
5. At the **License Agreement** screen, select **"I Accept the Agreement".** Then click **Continue** to continue.
6. If other Estimate client or server applications have already been installed on the server, select **Install** on the **Upgrade or Install** dialog and click **Next >** to continue.
7. At the **Components** screen under **User Workstation Components**, select the **Estimate Client** check box, then select the **Network** radio button.
8. On the **Components** screen under **Enterprise Server Components**, select the **Estimate Server** check box.
9. If you intend to use SQL Server 2014 Express Edition as the database for Estimate, select **Install SQL Express Edition with HDBID instance.**
10. If you choose not to use SQL Server 2014 Express Edition because you are using a different edition or version of SQL Server instead, deselect the **Install SQL Express Edition with HDBID instance**. If you don't select this option, another version of SQL Server must be installed manually.
11. Click **Next >** to continue.
12. On the **Select Destination Location** screen, define the installation folder for the **Estimate Framework**. To accept the default installation folder, you do not need to do anything. To define a different installation folder, click on the **Browse** button and navigate to the desired folder.
13. Click **Next >** to continue.
14. On the **Ready to Install** screen, click **Install** to continue.
15. On the **Installation Summary** screen, click **Next >** to continue.
16. Click **Finish** to complete the **Estimate Server** installation and **Exit** the setup program.

Share the Attachments Folder for Network Users

When running Estimate in network mode, if you want the ability to make a copy of attachment files inside the Job Folder you will be required to set the appropriate **Sharing and Security** permissions for the **Attachments** folder on the Estimate server (e.g., *C:\Program Files\InEight\InEight Estimate\Attachments*).

NOTE:	You have the ability to define an attachments path other than the default path (e.g., *C:\Program Files\InEight\InEight Estimate\Attachments*). See the Estimate Web Help for details on setting this path.

1. Using Windows Explorer, browse to the **Attachments** folder on the Estimate server machine (e.g., *C:\Program Files\InEight\InEight Estimate\Attachments*).
2. Right click on the **Attachments** folder (e.g., *C:\Program Files\InEight\InEight Estimate\Attachments*) and choose **Properties**.
3. Select the **Sharing** tab.
4. Click on the **Permissions** button, then select **Advanced Sharing**.
5. Select the checkbox for **Share this folder**. Under **Settings**, you can change the default **share name**, add comments, or limit the number of simultaneous users to a specific number of people.
6. Select **Permissions** under the **Comments** section. Select the Group or user names you would like to share the **Attachments** folder with.
7. For the group or user names to which you want to provide access, select **Full Control** in the **Allow** column under the **Permissions for Everyone** section.
8. On the **Permissions for Attachments** dialog, click on the **Apply** button.
9. On the **Permissions for Attachments** dialog, click on the **OK** button.
10. Click on the **Security** tab.
11. For each group or user name make sure that **Full Control** is selected in the **Allow** column.
12. On the **Attachments Properties** dialog, click on the **Apply** button.
13. On the **Attachments Properties** dialog, click on the **OK** button.

Installing the Estimate License Server

The Estimate License Server can be installed on any machine connected to the network to which all Estimate users have access. It can be, but does not need to be, installed on the same server that contains the Estimate Server application. The Estimate License Server and the associated server service must be running in order for users to access the licenses to the modules that you have purchased.

At the computer or server console where the Estimate License Server will be installed:

1. Start Windows as you normally would, then exit out of any programs that are currently running.
2. Launch the **Estimate** installer downloaded from the InEight website:
3. At the **User Account Control** screen, click **Yes** to allow the InEight Estimate application to make changes to your computer.
4. On the **Installation Package** screen, click the **Install** button to continue.
5. Click **Install Estimate** to continue.
6. At the **License Agreement** screen, select **"I Accept the Agreement".** Then click **Continue** to continue.
7. If other Estimate client or server applications have already been installed on the server, select **Install** on the **Upgrade or Install** dialog and click **Next >** to continue.
8. At the **Components** screen under **Enterprise Server Components**, select the **Estimate License Server** checkbox. Click **Next >** to continue.
9. At the Ready to Install screen, click **Install** to install the **Estimate License Server**.
10. After the **Installation Summary** screen appears, click **Next >** to continue.
11. At the **Installation Summary** screen, click **Next >** to continue.
12. Click **Finish** to complete the **Estimate License Server** installation and **Exit** the setup program.

NOTE:	To complete the Estimate License Server installation, you will be required to activate your license. You can activate your license over the Internet or by importing a license file. For additional instructions on activation, see the document **Activating the Estimate License**.

Installing the Estimate Standalone Client (Application and Database)

The Estimate Standalone Client installation is installed when the primary purpose of the user is to work with the Estimate client application, including web-based applications. A Standalone Client installation includes the installation of a database engine (SQL Server 2014 Express Edition) which allows the client to work in both a disconnected mode (not connected to a network) or connected mode.

NOTE:	When installing the standalone client application, security permissions for the INEIGHT ESTIMATE folder in the installation path (e.g., C:\Program Files\InEight\InEight Estimate) are automatically set to grant "full control" to all authenticated users.

At each client workstation where the Estimate Standalone Client will be installed:

1. Start Windows as you normally would, then exit out of any programs that are currently running.
2. Launch the **Estimate** installer downloaded from the InEight website:
3. At the **User Account Control** screen, click **Yes** to allow the InEight Estimate application to make changes to your computer.
4. On the **Installation Package** screen, click the **Install** button to continue.
5. Click **Install Estimate** to continue.
6. At the **License Agreement** screen, select **"I Accept the Agreement".** Then click **Continue** to continue.
7. If other Estimate client or server applications have already been installed on the server, select **Install** on the **Upgrade or Install** dialog and click **Next >** to continue.
8. At the **Components** screen under **User Workstation Components**, select the **Estimate Client** checkbox, then select the **Standalone** radio button. Click **Next >** to continue.
9. On the **Select Destination Location** screen, define the installation folder. To accept the default installation folder, you do not need to do anything. To define a different installation folder, click on the **Browse** button and navigate to the desired folder.
10. On the **Ready to Install** screen, click **Install** to continue.
11. On the **Select Additional Tasks** screen, select the additional shortcuts you would like to install you're your machine. Click **Next >** to continue.
12. On the **Installation Summary** screen, click **Next >** to continue.
13. Click **Finish** to complete the installation and **Exit** the setup program.

Test and Verify the InEight Estimate Installation

After installing Estimate on the client machines, you will want to verify that Estimate can connect to the network and create jobs. To test Estimate, you will first want to create a job from scratch. Creating a job from scratch will show you the basic operations of Estimate and if applicable will confirm the client can connect to the network.

Create a new Job from Scratch

1. Launch Estimate by choosing **Start > This PC > Program Files > InEight > InEight Estimate** then select **MainInterface.exe**. You can also access Estimate by double clicking on the **Estimate Client** desktop shortcut.

2. When Estimate launches, you will be taken to the backstage page. If it is not already selected, click on the **New** tab. Under **Create a new Job from…** section, select the option **Scratch**.

3. At the **New Job** screen, enter a **Code** for the new job. This will become the title of the job. You can also enter a **Description** but it's not mandatory.

4. You will then be taken to the **Job Properties** page under the **Setup** tab. You can now add setup information to your job. Once finished, select **OK.** A new job has been created successfully.

Create a new Job from an existing Job

1. Launch Estimate by choosing **Start > This PC > Program Files > InEight > InEight Estimate** then select **MainInterface.exe**. You can also access Estimate by double clicking on the **Estimate Client** desktop shortcut.

2. When Estimate launches, you will be taken to the backstage page. If it is not already selected, click on the **New** tab. Under **Create a new Job from…** section, select the option **Existing Job**.

3. At the **Job Register** screen, Select the job you would like to copy and then click **OK**.

4. Enter a **Code** for the new job and then click **OK**. This will become the title of the new job. You can also enter a **Description** but it's not mandatory.

5. The new job has now been created and is open on your screen.

Archive a Job

1. Launch Estimate by choosing **Start > This PC > Program Files > InEight > InEight Estimate** then select **MainInterface.exe**. You can also access Estimate by double clicking on the **Estimate Client** desktop shortcut.

2. When Estimate launches, you will be taken to the backstage page. Click on the **Archive / Restore** tab. Under the **Archive / Restore** section, then select the option **Archive Job**.

3. At the **Job Register** screen, select the job you would like to archive and then click **OK**.

4. Save the file with your preferred file name and to the preferred location. You can also save the file as a different file type. Select the **Save as type** dropdown to select a different save option. Then click **Save**.

5. At the **Success!** Screen, select **OK**. Your job has now been archived.

Restore a job

1. Launch Estimate by choosing **Start > This PC > Program Files > InEight > InEight Estimate** then select **MainInterface.exe**. You can also access Estimate by double clicking on the **Estimate Client** desktop shortcut.

2. When Estimate launches, you will be taken to the backstage page. Click on the **Archive / Restore** tab. Under the **Archive / Restore** section, then select the option **Restore Job Archive**.

3. At the **Select the Job Archive(s) to Restore** screen, select an archived job from your designated folder to restore. Then select **Open**. Your selected job has now been restored.