

Installing SLIM-Suite 10.1



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Tenth Edition

Contents

SLIM-Suite 10.1 Installation	1
Minimum System Requirements	1
SLIM-Suite Overview	1
Before You Install	2
License Information	3
Running Version 10.1 with Previous Versions of SLIM-Suite	3
Deciding Between Network and Local Installation	4
Sharing Workbooks and Databases	5
The Installation Process, Step by Step	6
Enter Activation Codes	8
Installing SLIM-Suite 10.1 to a Network	12
Why Choose the Network Install?	12
Network Setup	12
Workstation Setup	14
Managing Network Licenses	15
What Gets Installed	15
Application Files	15
License Files	18
License Updates	19
To update the license files:	19
Accept the License Terms	20
Customer Information	20
Enter Activation Codes	21
Select Components to Install	21
Maintaining SLIM-Suite	23
Uninstalling SLIM-Suite	26
Technical Support, Services, and Training	27
What's Available?	27
QSM Training	28
Free E-mail and Telephone Support	29
QSM Consulting Services	30
Contacting QSM	31
If you need to contact us:	31
Index	33

SLIM-Suite 10.1 Installation

Minimum System Requirements

To install and run SLIM-Suite 10.1 you will need:

- Microsoft Windows 7 service pack 1 or later, Windows 8.1, or Windows 10.
- 300-1000 MB hard disk space, depending upon how many SLIM-Suite applications are installed. As the applications require additional disk space to store and work with your files, we recommend keeping at least 100 MB free space on your hard disk. You will need at least 2 GB RAM for systems running Windows 7 or higher. Having more memory than required will result in better performance.
- A monitor capable of displaying at least 1024 x 768 with 256 colors and 96 dpi fonts (default small fonts). For optimal readability on multi-chart views, we suggest a width of no less than 1024.
- Internet access for installation. The SLIM-Suite setup file may be downloaded from the QSM [Downloads page](#). If you are unable to download the setup file, please call 800-424-6755 or [email Support](#).

SLIM-Suite Overview

The **SLIM-Suite 10.1** setup file contains installation information and supporting files for the following applications:

- **SLIM-Estimate.** This estimation tool helps you create project estimates and sanity checks them against your history and industry benchmarks.
- **SLIM-DataManager.** SLIM-DataManager helps you create a database to store your project estimates, in-progress projects, and completed projects.

- **SLIM-MasterPlan.** SLIM-MasterPlan rolls up individual task estimates and in-progress tasks to create a summary view of multi-release program scenarios or your entire development portfolio.
- **SLIM-Metrics.** QSM's metrics analysis and benchmarking tool helps you create custom queries, export database subsets, and discover trends hidden in your data.
- **SLIM-Control.** SLIM-Control helps you track and manage software projects during the development cycle. In Control you can track project actuals against the plan, prepare forecasts to completion, and create management scoreboards.

During setup, you will have the option to install only those applications for which the program detects valid activation codes.

Before You Install

1. Disable any anti-virus programs you may have running. Virus protection software can interfere with the setup program.
2. Make sure no other applications are open. Check the taskbar and close any programs you may have running.
3. Decide where you wish to place the applications. Setup will suggest **c:\Program Files(x86)\QSM\Tools101** as the default application directory but you may override this if you wish and install to a different directory or folder.
4. Check to make sure you have enough hard disk space free on the drive where Windows is installed. If you plan to install all five applications, you will need approximately **1 GB** of free disk space. To install and run a single application, you will need anywhere from **200-300 MB** of disk space.

IMPORTANT: To complete setup successfully, **you must have permission to modify the local system registry.** This requires that you log on with Administrative rights. If you do not have a user account with administrative rights, contact your network administrator and request that you be added temporarily to the local Administrator's group.

License Information

For information about your SLIM-Suite tools license, see the **QSM Customer Hosted License Agreement** displayed on the [QSM License Agreement page](#) and in the .pdf format User Guides (optionally) installed with SLIM-Suite.

In most cases, registration and activation codes are transmitted via email. Your license email should contain a Registration Code and one or more Activation codes, links to download the Setup files from the QSM web site, and instructions for installing or upgrading the applications. You will need the information in your license email to complete installation of your SLIM-Suite 10.1 Tools.

Once SLIM-Suite has been installed, license activation information can be viewed in the ReadMe.txt file located in your application directory (usually <drive letter>\Program Files(x86)\QSM\Tools101). You can also view the license agreement via the application splash screen that appears when you launch any SLIM-Suite application.

If you have any questions regarding your license or product activation codes, please contact the Account Manager or support contact listed on application splash screen, license email, or readme.txt file. If you cannot locate these resources, email QSM or call 1-800-624-4755 for assistance.

Running Version 10.1 with Previous Versions of SLIM-Suite

Once upgraded, SLIM-Suite workbooks are not backwards compatible with prior versions of SLIM. For this reason, we have made it possible to run multiple versions of SLIM-Suite on the same machine. Each application runs from its own directory (\Toolsxx) and maintains its own set of supporting files. If you need to exchange SLIM-Suite workbook files with users running earlier versions of SLIM-Suite, you can do so by keeping the earlier versions on your machine to open files created in these prior versions of SLIM-Suite.

When you are ready to switch over to SLIM-Suite 10.1 exclusively, you can uninstall previous versions of the Suite using any of the following methods:

- Clicking “**Uninstall SLIM-Suite nn**”, where “nn” represents the version number from the **Windows Start | All Programs | QSM Tools nn** or desktop shortcut folder.
- Running **Add/Remove Programs** or **Programs and Features | Uninstall a Program** from the Windows Control Panel.

Once you uninstall any version of SLIM-Suite, workbook files that were originally installed with the removed version will no longer be available, but workbooks and data files created *after* the applications were installed will remain. For more information on uninstalling SLIM tools, see [Uninstalling SLIM-Suite](#) (page 26).

Deciding Between Network and Local Installation

One question we often get from SLIM users is, “What’s the best way to deploy SLIM-Suite tools in a distributed environment?” The answer to that question will depend on two factors:

1. How you intend to use the applications
2. The needs of your user community.

SLIM applications can be installed on individual local machines (a standalone configuration) or over a network (the network install). You may also choose a hybrid configuration where users run the tools over a network when at work, but use the standalone copy when they are on the road.

There are advantages and drawbacks to each type of configuration:

- **Standalone mode** Standalone installations are more convenient for laptop users who travel frequently or work at home. Even with a VPN, users will generally find the applications perform more snappily if the applications are installed locally. If workbook files are stored on the user’s machine, problems with multiple users accessing the same workbook and possibly overwriting each other’s changes are easier to avoid.
- **Network installations**, on the other hand, are easier to maintain when it comes time to administer annual license updates, product upgrades, or patches. For this reason alone, large corporations with many users may find a network configuration more practical.
- **Hybrid or dual installations** allow users the flexibility of staying on a consistent platform when updates must be pushed out quickly while giving them the freedom to travel and work at home. The Network copy can be updated easily when upgrades or patches become available. Local copies of SLIM-Suite may then be upgraded in a more leisurely manner.

Sharing Workbooks and Databases

A related question deals with file storage: where is the best place to keep various types of SLIM files? The important considerations are:

- Who needs **to update the data** in the file?
- Who **needs access** to the file?

Do users truly need access to the original data (and do you want multiple users updating it)? Or would it be better to have one person manage the file and make reports available to other users? The following example may make this clearer.

Often, clients want to place their central historical data repository (a SLIM-DataManager database) on the network and allow distributed users to add projects to it remotely without any centralized oversight. The hope is that their data repository will grow swiftly and everyone will benefit from having immediate access to the data. But this practice does not support data integrity.

Newly submitted project data is rarely completely accurate in its first iteration. For this reason, it is advisable to appoint a database administrator to validate all incoming project data. Distributed users submit their data to the administrator for validation. At periodic intervals, the administrator publishes updates to the central repository on the network. This way, only complete and accurate data will be used for validating estimates and benchmarking. When each new database is published, the administrator can send out a message asking all users to update the files on their local machines with the newest version.

It is often advisable to keep smaller, specialized databases on local machines for individual use during estimation or benchmarking analysis. These databases can be created using the query functionality in SLIM-Metrics by exporting a database subset from the File menu. Ultimately, where a file is stored really does depend upon how the file is to be used, who needs access to the data in the file, and which data (and in what form) they require access to.

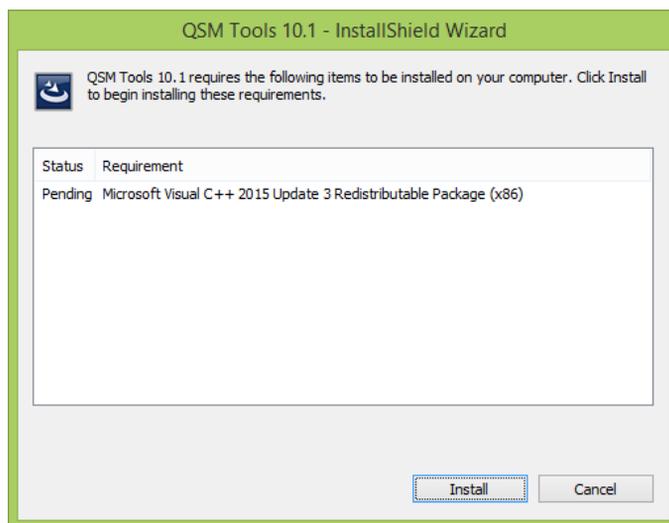
The Installation Process, Step by Step

To help you understand your options as you proceed through setup, this section provides an in-depth view of the setup process. To begin installing SLIM-Suite, run a downloaded copy of **QsmTools101.exe** or (if you requested a physical CD) insert the **SLIM® SUITE setup file** into your CD-ROM drive. Instructions, URLs, and password information for downloading the setup program are included with your license email.

If you are running setup from the CD and setup does not start automatically, click the **Start button** on your taskbar, then select **Run**. Type in `D:\Setup.exe` (substitute the correct drive letter for your CD-ROM drive if needed) or browse to **QsmTools101.exe** on the product CD. If SLIM-Suite 10.1 is already installed on your machine, setup will display a Maintenance dialog. See “[Maintaining SLIM-Suite](#) (page 23)” for more information on maintaining your SLIM tools.

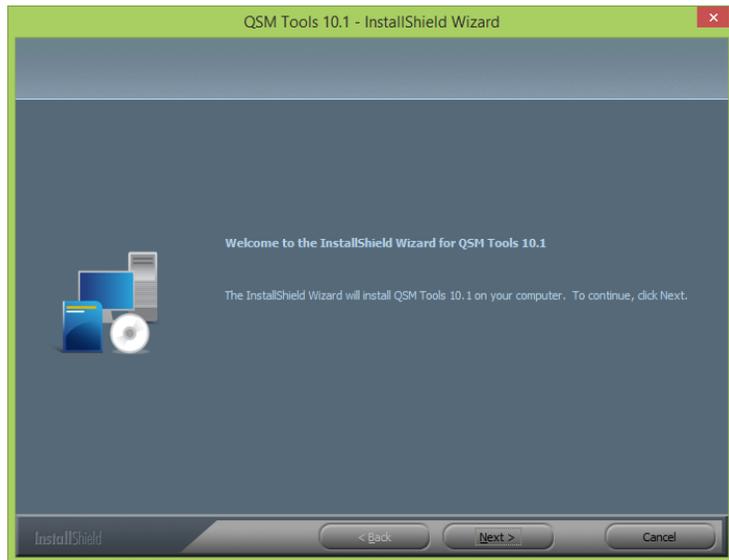
Installing Required Library Files

If the setup file does not detect the required libraries on your machine, you will be prompted to install them before Setup continues. Click “**Install**” to complete this step.



Welcome Screen

The Welcome Screen begins the installation process. Press **Next** to proceed to the next screen.



Accept the License Terms

Read the License Agreement screen. To accept the License Terms, click the **“I accept the terms of the license agreement”** radio button and press **Next** to proceed to the next screen. If you choose **“I do not accept the terms of the license agreement”**, Setup will terminate and SLIM-Suite will not be installed.

Enter Customer Information and Registration Code

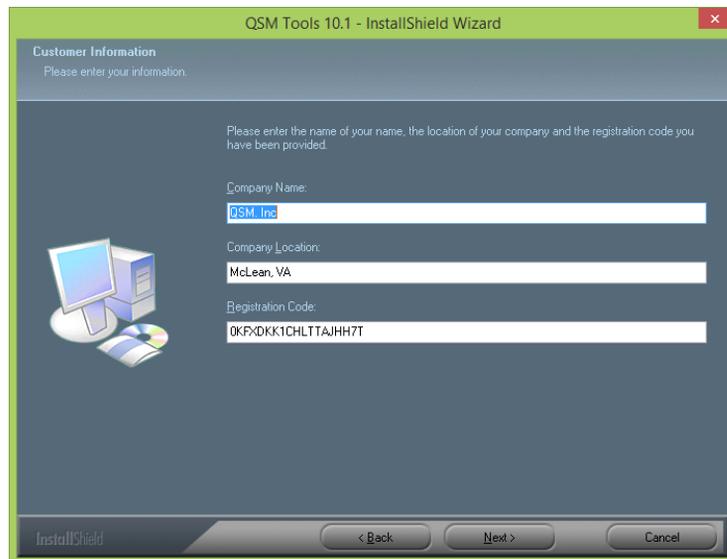
Enter your **Company Name** and **Company Location** *exactly as they appear in the license email you received from QSM*. You will also need to enter the **Registration code** from your license email.

Typically, the license information will look something like this:

Company Name: QSM, Inc.
Company Location: McLean
Registration Code: 26SUKKKFFRO96ALXN50
Activation Code 1: 23U4XVSO7ZM4Q6NP

This license information is valid for 363 days beginning 7/20/2018.

If you received license information via email, you can copy this information as one block of text (taking care not to capture and paste in leading or trailing spaces) and the installation program will paste this information into the Setup dialog to reduce the possibility of transcription errors. Note that this information must match your license email exactly. If Setup detects a mismatch, you will see a **Checksum error**. In most cases, checking and re-entering the customer information and registration code will resolve the error. If you require assistance, [email QSM support](#) or visit our [Installation FAQs page](#).



The screenshot shows a window titled "QSM Tools 10.1 - InstallShield Wizard" with a "Customer Information" section. The instructions read: "Please enter your information." and "Please enter the name of your name, the location of your company and the registration code you have been provided." There are three input fields: "Company Name" with the text "QSM, Inc", "Company Location" with "McLean, VA", and "Registration Code" with "OKFXDKK1CHLTTAJHH7T". A small icon of a computer monitor and CD/DVD is on the left. At the bottom, there are "Back", "Next", and "Cancel" buttons.

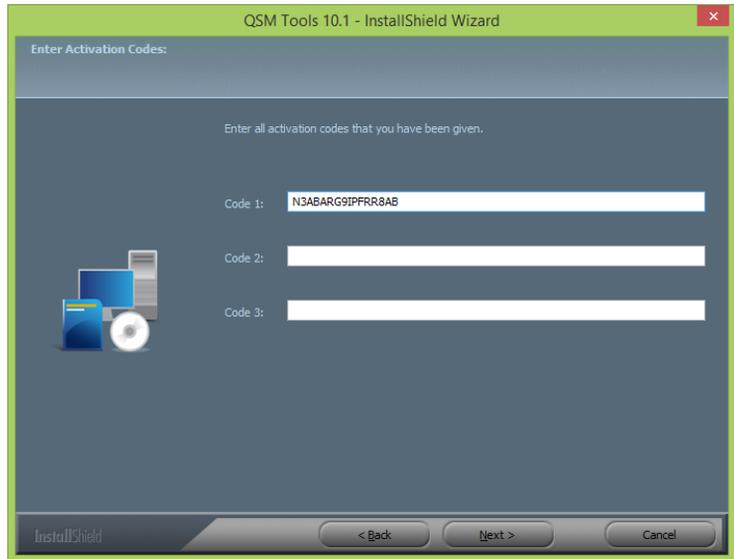
Once you have completed the requested information, press **Next** to proceed to the next screen.

Choose a Destination Location

Choose a destination folder for your application files. The default folder on most Windows systems is **C:\Program Files(x86)\QSM\Tools101**. Select an alternate destination folder if desired, then click **Next** to continue.

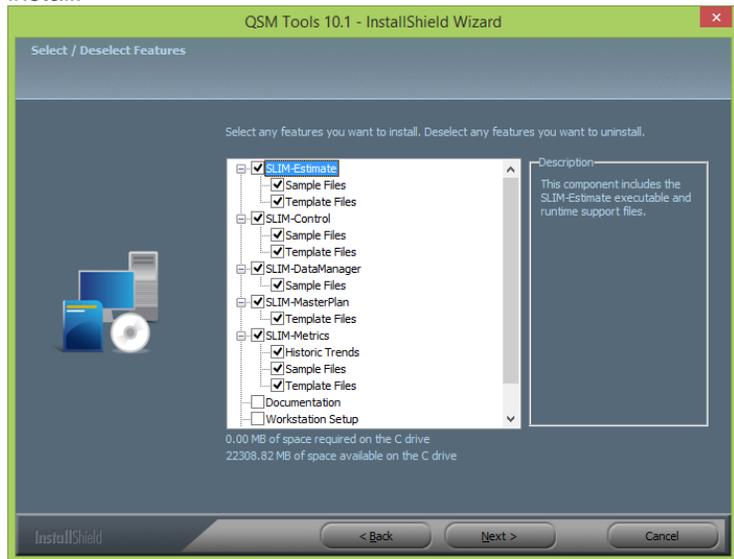
Enter Activation Codes

Enter all activation codes provided with your license email or letter. If you received license and registration information via email, you may want to copy and paste the license information to reduce the possibility of transcription errors. In most cases, there will be only one activation code. Select **Next** to proceed.



Select Components to Install

On the **Select Features** screen, you will be presented with a list of the applications you are licensed to install.



Click the plus icon to the left of each application name to expand the item and see a list of optional Sample, Template, or Historic Trend files that can be installed along with it. As you select/deselect features to install, the amount of disk space required on the host machine may change.

Sample Files

Sample workbooks for each application are installed in the **QSM\Tools101\Samples** folder under **My Documents**. Sample files are for inspection or demo use and include data.

Template Files

Templates contain all the common settings (environment and life cycle settings, custom metrics, chart and report outlines, etc.) needed to get you up and running quickly with estimates, project tracking and forecasting, or sizing a new project. SLIM-Estimate, SLIM-Metrics, and SLIM-Control templates and sizing templates are contained in the Templates folder.

SLIM-Suite templates are in the **QSM\Tools101\Templates** or **MasterPlan Templates** folders under My Documents. SLIM-MasterPlan templates are contained in the MasterPlan Templates folder.

Historic Trends Files

These SLIM-Metrics workbooks contain older QSM industry trends that can be imported into SLIM-Estimate, SLIM-Control, or SLIM-Metrics workbooks to support benchmarking and estimation. If installed, they can be found in the **QSM\Tools101\Historic Trends** folder under My Documents.

Documentation

Checking the “Documentation” checkbox installs SLIM-Suite user and Installation manuals in pdf format to the **QSM\Tools101\Documentation** folder under the user’s Documents directory. NOTE: For version 10.1, the pdf documentation will be for version 10.0 (for the most recent documentation, use the context sensitive online or NetHelp).

Workstation Setup

This option should only be checked for network installs. If you are installing SLIM-Suite to a network file server, you must install the Workstation Setup component. Doing so creates a **Workstation Setup** folder under the application directory on the server. It contains a setup file that allows local workstations to run SLIM-Suite over the network. After server installation has completed, each workstation user should run the Setup program in the Workstation Setup folder.

NOTE: If you are installing the applications to a standalone PC, leave the Workstation Setup option unchecked.

PPM Framework

Checking the “PPM Framework” option installs a folder containing developer support files that can be used to build integrations between SLIM-Estimate and PPM tools like Clarity or Primavera. These components are designed for use by developers – they are not required for users of the PPM integration. The presence of this folder will not affect normal use of SLIM-Estimate. For more information on integrating SLIM-Estimate with PPM tools, contact your QSM Account Manager at the number listed in your license email or [contact QSM support](#) for assistance.

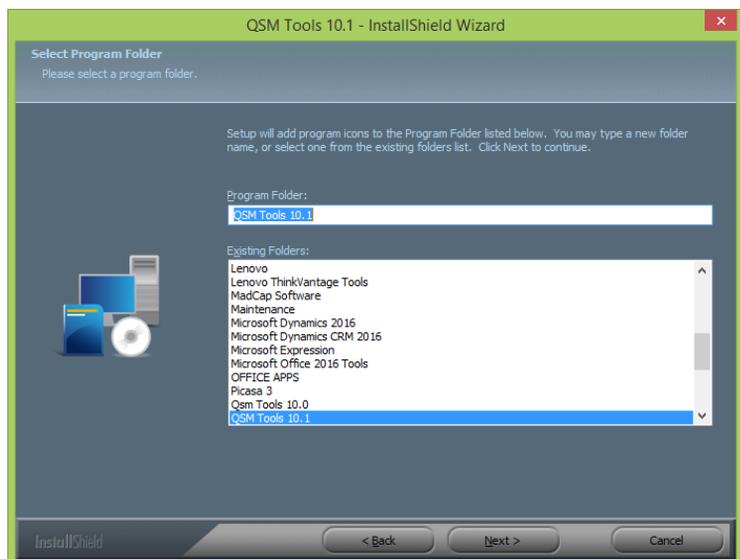
Debug Symbols

This option adds special symbols that can be used by QSM developers to diagnose and resolve software errors. SLIM-MasterPlan is the only tool that does not use debug symbols.

Once you have carefully reviewed the optional components and support files that can be installed with SLIM-Suite, click **Next** to proceed to the next screen.

Select a Program Folder

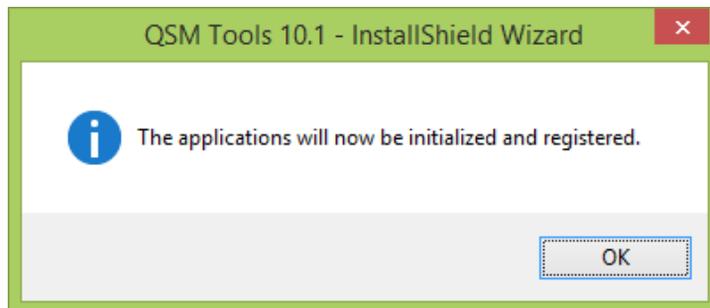
This screen allows you to select a name and location for the program shortcuts folder. The default name for the folder is **QSM Tools 10.1**, but you may type in a different name. Shortcut icons will be placed on the start menu and on your desktop in a folder named **QSM Tools 10.1** (assuming you accepted the default program folder).



Selecting an existing folder from the second list box will place shortcuts under the selected folder in your **Start** menu. Use the **Next button** to continue setup.

Start Copying Files/Review Settings

Review the choices you have made so far. To make a change, press **Back**; otherwise, press **Next** to continue. The actual copying and installation of files will take a minute or two depending on the options selected and the speed of your machine. Once you see this message, you're ready to begin using your SLIM-Suite applications!



Installing SLIM-Suite 10.1 to a Network

Why Choose the Network Install?

SLIM-Suite tools can be run in standalone mode from a local workstation or deployed over a LAN (local area network). Your deployment strategy should reflect the needs of your SLIM users. If they travel or need to use the applications when the network is not available, a standalone (local) installation is usually the best option. On the other hand, deploying the applications over a network makes it easier to push out product upgrades and license extensions.

For information on network usage restrictions, see the **QSM Customer-Hosted Software License Agreement** displayed on the [QSM License Agreement page](#) and in the .pdf format User Guides installed with SLIM-Suite. Your license email contains information about which tools are licensed, the license expiration date, and the number of licensed users for each application. It will also include registration and activation codes.

Network Setup

To install SLIM-Suite to a network computer, simply run Setup and the Workstation Install program as described below. To

ensure access to the workstation setup program, the applications should be installed to a shared directory or folder.

Once the application files are installed on the server, each user will need to run a separate setup program from the **Workstation Setup** directory found in the application directory on the server (**<drive letter>:\Program Files(x86)\QSM\Tools101**), if you accepted the default application path during setup).

IMPORTANT: To complete network and workstation setup successfully, both installers must have permission to modify the local system registry. Whether you are running the network or workstation install programs, **this requires that you log on with Administrative rights**. If you do not have a user account with administrative rights, contact your network administrator and request that you be added temporarily to the local Administrator's group.

To begin the network install:

1. Download and run the **SLIM-Suite®** setup file (**QsmTools101.exe**) from the QSM web site (instructions are provided in your license agreement email).
2. If you previously installed SLIM-Suite 10.1 onto your machine, setup will display a **Maintenance** dialog. See the section "[Maintaining SLIM-Suite](#) .
3. Setup will copy the selected application, template, sample and common system files to the network server and create a **\QSM\Tools101** folder under the Program Files (x86) directory. Sample workbooks, and templates will be copied into separate subfolders located under the Documents folder of each local workstation (the default location is, **<drive letter>\<user profile>\Documents\QSM\Tools101**):

Samples

Templates

PDF copies of the SLIM-Suite user documentation can be found in the Documentation folder on the server. If you are running the tools over a network, these folders should be shared or copied to a shared directory.

4. During the Workstation Setup, shortcut icons will be placed on the start menu and on the desktop of the local workstation in a folder named QSM Tools 10.1 if the default program folder was used during setup.

To view more complete, step by step installation instructions, see [“The Installation Process Step by Step \(page 6\)”](#).

Workstation Setup

Once the applications have been installed to the server, each workstation user should navigate to the application directory (<NetworkShareName>\Workstation Setup), open the **Workstation Setup** folder, and run **Qsm101Workstation.exe**. The Workstation setup program creates application shortcuts and a few registry entries on the workstation, activates licenses for the workstation, and installs common system files required to open and manipulate SLIM-Suite workbook files.

IMPORTANT: To complete network and workstation setup successfully, both the installer must have permission to modify the local system registry. Whether you are running the network or workstation install programs, **this requires that you log on with Administrative rights**. If you do not have a user account with administrative rights, contact your network administrator and request that you be added temporarily to the local Administrator's group.

Granting Access to Workstation Setup

To provide workstation users with access to the workstation setup program, you have two options:

- **Share the following folders:**
 - **Application folder** (<drive letter>:\Program Files(x86)\QSM\Tools101)
 - **Supporting files folder** (<drive letter>\< user profile>\Documents\QSM\Tools101)
 - **Workstation setup folder.**

This option is easiest for the user as it allows setup to discover the path to the application, support, and license files on the server. During network setup, sample workbooks and templates will be copied into various subfolders named \Samples, \Templates, under the All Users\MyDocuments folder.
- **Share only the Workstation Setup folder.** This option requires you to provide each workstation user with the path to the application folder on the server. Since the application folder is not shared, setup will not be able to detect the location of the application/license files when workstation setup is run from the client machine. The user will need to type in the path manually during setup.

If you choose to install the Supporting Files (Samples, Templates, and other helpful resources), these files will be installed under the My Documents folder associated with the user profile the installer is logged in under. To ensure access to these files, we recommend copying them to a shared folder on the network and providing access to all Workstation users.

Managing Network Licenses

Before distributing **Workstation Setup** information to network users, take a moment to review the **Readme.txt** file located in the application (Toolsnn, where nn represents the SLIM-Suite version) directory. This file contains information on which tools are licensed and the number of licensed users for each application.

This information should be distributed to workstation users if necessary. If your organization has the same number of licensed users for each application, no special arrangements are necessary. **If, however, you have a multi-user license for some tools and a single or limited license for one or more tools, you should provide each user with a list of the tools they are licensed to install along with the Workstation Setup directions.**

Each user should install only those SLIM applications for which they have specific license files.

What Gets Installed

Application Files

The default application folder is “<drive letter>\Program Files(x86)\QSM\Tools101”. The Tools101 folder contains application executables, help files, prototype run files, and application support files.

Sample workbooks and templates will be copied to various subfolders named \Samples, \Templates, and \Master Plan Templates located in the QSM folder under the local My Documents directory. PDF copies of the user documentation can be found in the \Documentation subfolder. If you are running the tools over a network, these folders are copied to the My Documents\QSM folder in the System Administrator’s user library. All application data files should be shared or copied to a shared directory.

SLIM-Estimate 10.1

Files in the application folder:

- **SEstimat.exe** - application executable
- **SEstimat.run** - prototype run file template
- **SEstimat.chm** - help file
- **SEstimat.tlb** – a type library file used for OLE automation
- **QsmSecurity.dll** – application support file
- **QsmDA.dll** – data access layer support file
- **InitialSkill.xml** – skill categories support file
- **PPM (optional, if installed)** – dlls that support the PPM integration framework

Files in the Samples and Templates folders:

- **Excel Sizing templates (.xltn files)**
- **Sample workbooks (.sew files)**
- **Template workbooks (.sew files)**

Files in the Documentation folder:

- **SLIM-Estimate.pdf** (Estimate manual)

SLIM-DataManager 10.1

Files in the application folder:

- **SDataMgr.exe** - application executable
- **SDataMgr.run** - prototype run file
- **SDataMgr.chm** - help file
- **SDataMgr.tlb** - a type library file used for OLE automation
- **QsmSecurity.dll** – application support
- **QsmDA.dll** – data access layer support file

Files in the Samples and Templates folders:

- **Sample databases (.smp files)**
- **Template workbooks (.smp files)**

Files in the Documentation folder:

- **SLIM-DataManager.pdf** (DataManager manual)

SLIM-Metrics 10.1

Files in the application folder:

- **SMetrics.exe** - application executable
- **SMetrics.run** - prototype run file
- **SMetrics.chm** - help file
- **QsmSecurity.dll** – application support
- **QsmDA.dll** – data access layer support file

Files in the Samples and Templates folders:

- **Sample workbooks** (.smw and .smp files)
- **Template workbooks** (.smw and .smp files)

Files in the Documentation folder:

- **SLIM-Metrics.pdf** (Metrics manual)

SLIM-MasterPlan 10.1

Files in the application folder:

- **SMaster.exe** - application executable
- **SMaster.run** - prototype run file
- **SMaster.chm** - help file
- **QsmSecurity.dll** – application support
- **QsmDA.dll** – data access layer support file
- **InitialTask.xml** – skill categories support file

Files in the MasterPlan Templates folder:

- **Sample workbooks and templates (various .sea, .scw, and sew files)**

Files in the Documentation folder:

- **SLIM-MasterPlan.pdf** (MasterPlan manual)

SLIM-Control 10.1

Files in the application folder:

- **SControl.exe** - application executable
- **SControl.run** - prototype run file template
- **SControl.chm** - help file
- **SControl.tlb** – a type library file used for OLE automation
- **QsmSecurity.dll** – application support
- **QsmDA.dll** – data access layer support file
- **InitialSkill.xml** – skill categories support file

Files in the Samples and Templates folders:

- **Sample workbooks** (.scw files)
- **Template workbooks** (.scw files)

Files in the Documentation folder:

- **SLIM-Control.pdf** (Control manual)

License Files

Before the applications will run, your license information must be activated using the installed license files. Once setup is complete, there may be times when it becomes necessary to update the license information. This can happen if your license period is extended, you add or subtract tool licenses, or the number of authorized users changes.

License Updates

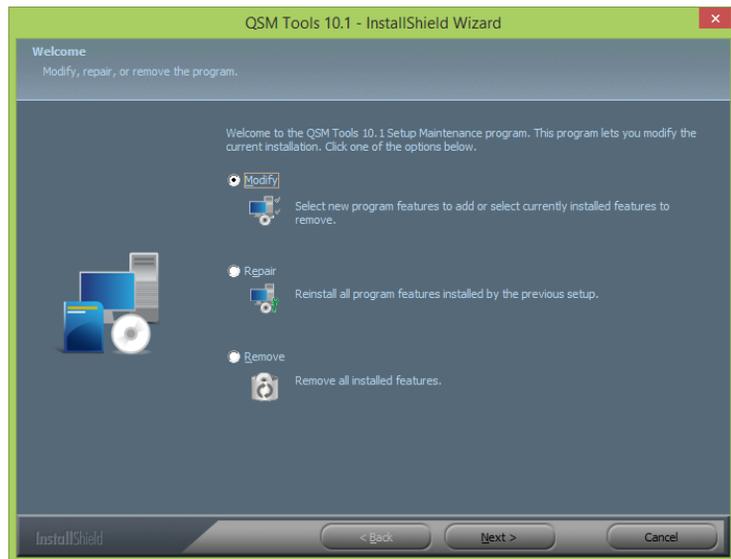
If it becomes necessary to update your license information after installation, you will receive new registration/activation codes and support text from QSM via fax, phone, email or printed form.

Note: Only a standalone or network server installation can have its license files updated. It is not possible to update license files from a workstation installation.

To update the license files:

From the Windows **Control Panel**, choose **Uninstall or Change a Program**. Scroll down until you see the entry for **QSM Tools 10.1**, then click the **Change** button or right click the **QSM Tools 10.1** list entry and select **Change** from the popup menu.

This will bring up the **QSM Tools 10.1 - InstallShield Wizard**. Leave **Modify** as the selected choice and click **Next**.

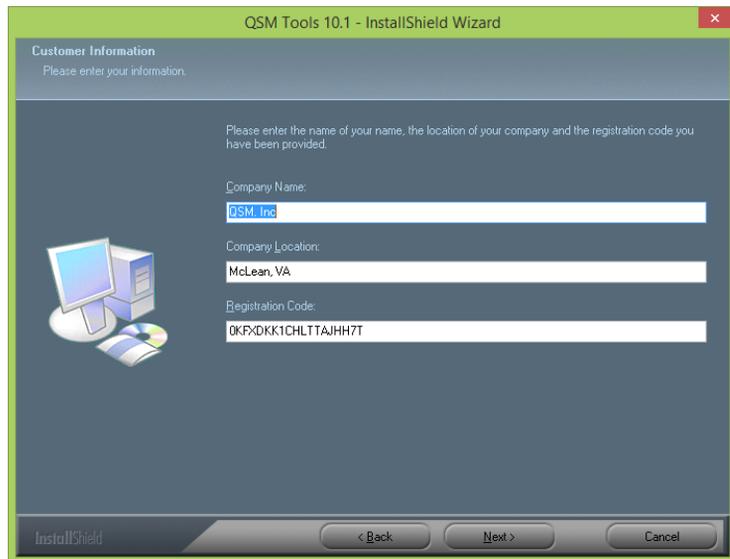


Accept the License Terms

Read the License Agreement screen. To accept the License Terms, choose the **“I accept the terms of the license agreement”** button and press **Next** to proceed. Choose **“I do not accept the terms of the license agreement”** (if you do not accept) to exit Setup.

Customer Information

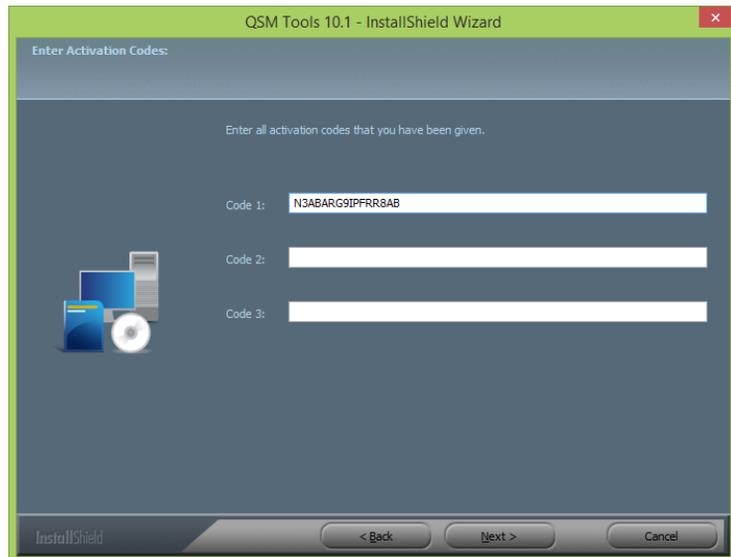
Enter your **Company Name** and **Company Location** *exactly as they appear in the license email or letter you received from QSM*. You will also need to enter the **registration code** supplied with your license information. If you received license renewal information via email, you may want to consider using copy and paste to reduce the possibility of transcription errors. Click **Next** to continue.



The screenshot shows the 'Customer Information' screen of the 'QSM Tools 10.1 - InstallShield Wizard'. The window title is 'QSM Tools 10.1 - InstallShield Wizard'. The screen has a dark blue background with a light blue header area. The header area contains the text 'Customer Information' and 'Please enter your information.' Below this, there is a sub-header: 'Please enter the name of your name, the location of your company and the registration code you have been provided.' To the left of the input fields is an icon of a computer monitor, a tower PC, and a CD/DVD. There are three input fields: 'Company Name:' with the text 'QSM, Inc', 'Company Location:' with the text 'McLean, VA', and 'Registration Code:' with the text '0KFXDKK1CHLTTAJHH7T'. At the bottom of the window, there is a dark grey bar with the 'InstallShield' logo on the left and three buttons: '< Back', 'Next >', and 'Cancel'.

Enter Activation Codes

Enter all activation codes provided with your installation packet. If you received your installation packet via email, you may want to use copy and paste to reduce the possibility of transcription errors. Click **Next** to proceed to the next screen.

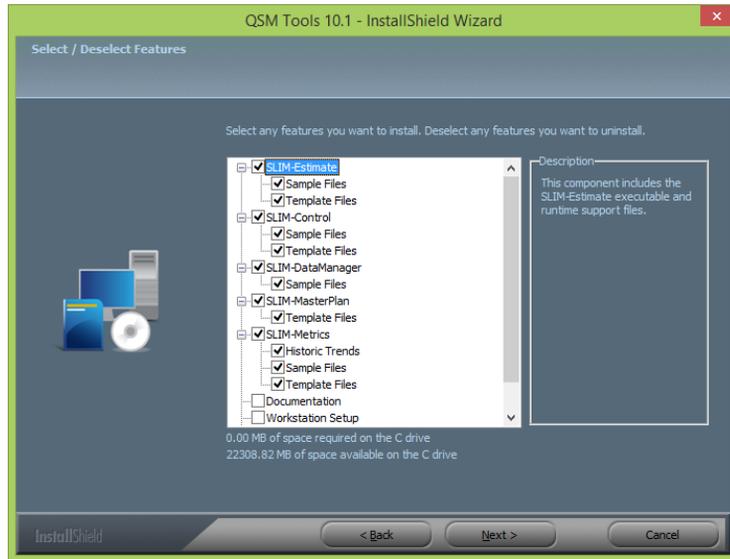


There may be only one activation code. Click **Next** to proceed to the next screen.

Select Components to Install

On the **Select Features** screen you will be presented with a checkbox list of the applications you are licensed to update and any components that have already been installed. There is no need to alter the default settings unless you do not wish to install all the applications.

Note: If you are modifying an already installed version of SLIM-Suite 10.1, unchecking any of the components in this list will cause those components to be uninstalled.



Sample Files

Sample workbooks for each application are installed in the **QSM/Tools101/Samples** folder under **My Documents**. Sample files are for inspection or demo use and include data.

Template Files

Templates contain all the common settings (environment and life cycle settings, custom metrics, chart and report outlines, etc.) needed to get you up and running quickly with estimates, project tracking and forecasting, or sizing a new project. SLIM-Estimate, SLIM-Metrics, and SLIM-Control templates and sizing templates are contained in the Templates folder.

SLIM-Suite templates are located in the **QSM\Tools101\Templates** or **MasterPlan Templates** folders under My Documents. SLIM-MasterPlan templates are contained in the MasterPlan Templates folder.

Documentation

SLIM-Suite User Guides in .pdf format will be installed to the **QSM\Tools101\Documentation** folder under My Documents. NOTE: For version 10.1, the pdf documentation has not been updated from the 10.0 version. For the most recent documentation, use the 10.1 context sensitive online help or NetHelp.

Workstation Setup

This option should only be checked for network installs. If you are installing SLIM-Suite to a network file server, you must install the Workstation Setup component. Doing so creates a **Workstation Setup** folder under the application directory on the server. It contains a setup file that allows local workstations to run SLIM-Suite over the network. After server installation has completed, each workstation user should run the Setup program in the Workstation Setup folder.

NOTE: If you are installing the applications to a standalone PC, leave the Workstation Setup option unchecked.

PPM Framework

Checking the “PPM Framework” option installs a folder containing developer support files that can be used to build integrations between SLIM-Estimate and PPM tools like Clarity or Primavera. These components are designed for use by developers – they are not required for users of the PPM integration. The presence of this folder will not affect normal use of SLIM-Estimate. For more information on integrating SLIM-Estimate with PPM tools, contact your QSM Account Manager at the number listed in your license email or [contact QSM support](#) for assistance.

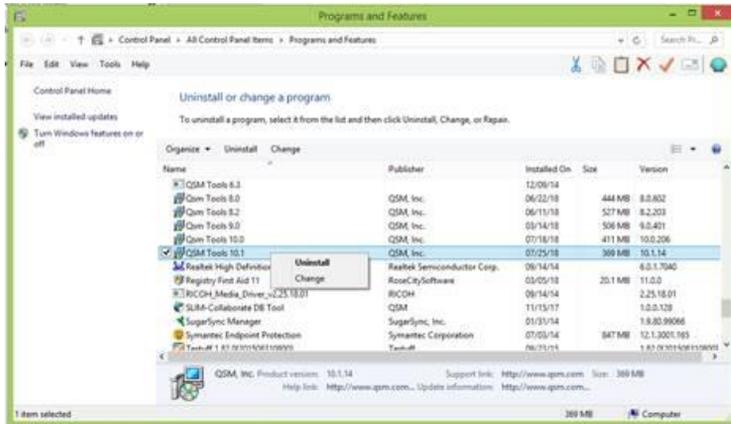
Once you have carefully reviewed the list of installable applications and support files and selected the ones you wish to install, click **Next** to continue. When the installation modification process has completed, you will be notified of any license updates that occurred.

If you are unable to update your license or you receive an error message regarding your license files, visit the [Install FAQs page](#) on the QSM web site, [email QSM](#), or call **800 424-6755 for assistance**.

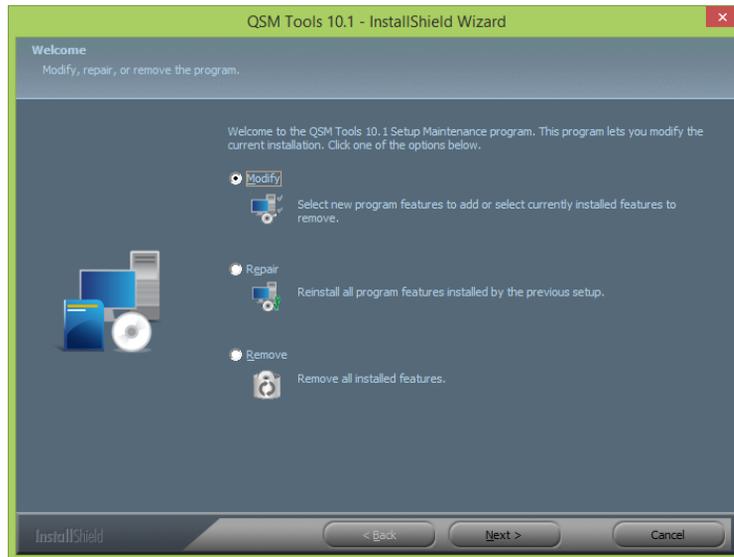
Maintaining SLIM-Suite

Once you have installed SLIM-Suite, you may wish to add or remove applications from your computer or repair damaged or missing files. To do this, use the **Repair** portion of the installation. To access the Maintenance screen, use the **Programs and Features** or **Add or Remove Programs** utility in the Windows Control Panel.

Click the **Change** button to make modifications to your installation. Windows users will see a dialog similar to this:



Right click the **QSM Tools 10.1** list item and select **Change** from the popup menu. The Welcome dialog will appear.



Use the **Repair** option to restore missing or modified files. If you select the **Repair** option and click **Next**, setup will immediately begin restoring the installation to the condition it was in when the installation was last completed. Note that setup will not overwrite any executable or support files that have been updated.

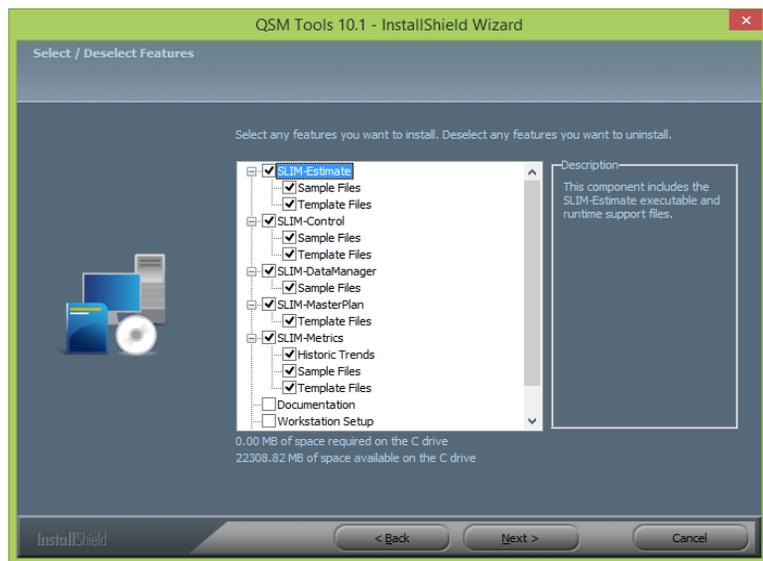
The **Remove** option completely removes SLIM-Suite 10.1 from your computer. Workbooks created after the software was installed will not be deleted.

The **Modify** option adds or removes components or updates your SLIM-Suite 10.1 license files. If you click the **Next** button

when the **Modify** option is selected, you will see the **License Agreement** screen. The next screen is the **Customer Information** screen – it should have the same information that was entered the last time the install program was run.

Note: If you are using the **Modify** option to update your SLIM license files, you may need to enter the new registration code that was supplied with your license update packet. **If you want to change which applications are installed, you will need to verify that the registration number matches the information in your installation packet.**

Once your customer information has been entered correctly, click **Next** to advance to the **Enter Activation Codes** screen. Enter the activation codes from either your license update packet or your installation packet. Click **Next** to advance to the **Select / Deselect Features** screen. For more information about installable components and support files, see the Installation or License Updates sections of this user guide.



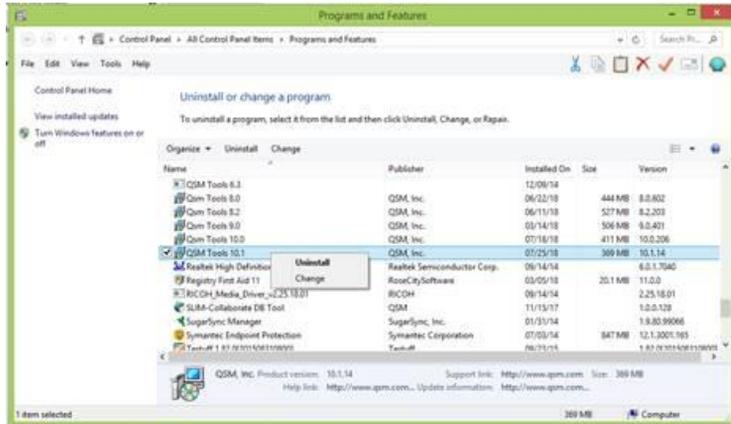
Note: When running setup in Maintenance mode, the check marks indicate features that are already installed and features that can be installed as a result of changes in your license agreement. If you uncheck any of the features on this screen, those features will be uninstalled during the update process.

Uninstalling SLIM-Suite

To uninstall SLIM-Suite from your machine, use the **Programs and Features | Uninstall or Change a Program** utility in the Windows Control Panel.

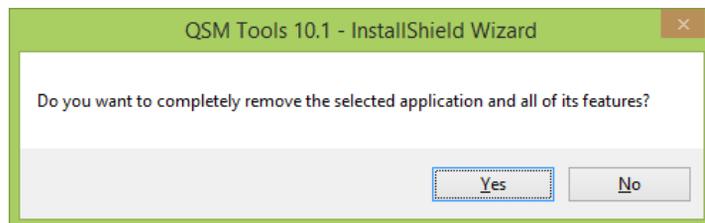
You can find the Control Panel by clicking the **Windows Start Button -> Windows System -> Control Panel** on your machine.

Select **QSM Tools 10.1** from the list of programs, then click the **Uninstall** button or **Change** button



Uninstall or change a program dialog in Windows 8.1. Other Windows versions will look similar.

The installation program will prompt you for confirmation before uninstalling the SLIM tool suite. Only files that were originally installed with the suite will be removed – your data files will remain intact after you remove SLIM-Suite from your machine.



Technical Support, Services, and Training

What's Available?

Once you begin using your SLIM tools, you may wonder what options are available when you need assistance. The good news is that free technical support is included with your SLIM tools license. In addition to the **User's Guides** and **Online Help**, there are several options available to you as a licensed SLIM user:

- QSM Training
- Free e-mail and phone support
- QSM Web Site articles, templates, FAQ's, and more.
- Free upgrades during your license period
- QSM Deployment Consulting Services

QSM Training

At QSM, training is an important way to make sure you receive maximum value from your investment in SLIM tools. We know that our clients are smart people looking for better ways to do their jobs. If we provide the right tools, (and show our clients how to use them effectively) they become better problem solvers and achieve extraordinary results. Training is the key ingredient that allows excellence in any line of work.

Our **SLIM-Estimate, Control, Metrics, and SLIM-Collaborate Courses** focus on building practical skills that you can apply as soon as you return to your business. Class sizes are deliberately kept small to provide students with individual coaching. SLIM training is now delivered online in convenient, half-day training sessions designed to fit into your busy work schedule. Our instructors are professionals in the software measurement industry with many years of problem-solving experience. They understand the complexities of building software products and know how to adapt QSM tools to a wide range of environments. With most SLIM tool licenses, a specified number of free training seats are included.

To find out how you can take advantage of SLIM training, contact QSM at **800 424-6755** from Monday – Friday, 9 a.m. to 5 p.m. EST. Training schedules, course outlines, and additional information are also available on the QSM Web site at <http://www.qsm.com/training.html>.

Free E-mail and Telephone Support

Even with the best training, manuals, and online Help we can provide, most people will have questions from time to time. That's why QSM offers free e-mail and telephone support as part of your annual license.

Technical support representatives are available from **9:00 AM to 5:00 PM Eastern Standard Time, Monday – Friday** (except holidays). Faxes, e-mails, and voice mail messages will be answered the same day under normal circumstances.

Phone: 1 800 424-6755
E-mail: support@qsm.com
Fax: 1 703 749-3795

The QSM web site, www.qsm.com, is another resource for both new and experienced SLIM tool users. Support resources include:

- The [Support page](#): one-stop shopping for FAQ's, templates, links to other resources
- A searchable [Frequently Asked Questions section](#) to provide support outside of normal business hours and serve as an additional reference. This area is for QSM clients only - you can register for access passwords on the main support page.
- The [Articles & Papers](#) page contains articles and research from the QSM database as well as useful whitepapers.
- The [Support Resources Directory](#) contains quick references guides, how-to papers, and sample templates by category of interest.
- [SLIM-Suite Video Tutorials](#): view short Video Tutorials on how to use and apply a variety of tool features.

You can also visit the [Training Overview](#) page to get information about training schedules, course outlines, and register for classes.

QSM Consulting Services

QSM also offers a [full line of consulting services](#) to help you get a head start. QSM has helped hundreds of organizations execute successful projects, explore practical planning alternatives, and minimize risk.

- **Runaway System Assessment** - Apply quantitative objective measures of scope, milestones, spending and reliability to forecast delivery dates and actual costs.
- **New Contract Bid Support** - We'll find and present practical alternatives that can scientifically position you to win more business—and our estimates of skills, categories, and rates can go straight into your pricing systems.
- **Function Point/Scope Sizing** – Our experts size your applications using several industry recognized sizing methods including ISO standard Function Point analysis to help provide clarity and transparency. The size estimates can further be used as an input for schedule and cost analysis.
- **Productivity Baseline and Benchmarking** – Measure the productivity impact of moving to a new tool or method. See how you compare to organizations building similar application by leveraging QSM's 13,000 project database to benchmark your performance.
- **SLIM Tool Configuration, Mentoring & Deployment** – Improve SLIM tool adoption and roll out by leveraging our templates, advice, training, awareness sessions, and articles.
- **SLIM API & Interface Development** - Take advantage of the SLIM data in other enterprise applications using our developers' solutions.
- **Expert Witness Support** – We leverage our database of 13,000 completed projects to provide historical perspective and our expert consultants can model realistic scenarios at the project, program and portfolio level.

We offer time tested solutions for the portfolio and program/project level, and workshops for building analytical skills at the individual level. To learn more, visit <http://www.qsm.com> or call **1 800 424-6755**.

Contacting QSM

If you need to contact us:

General

Main Phone: 1 703 790-0055
Toll Free number: 1 800 424-6755
Fax: 1 703 749-3795
QSM Web Site: <http://www.qsm.com>
E-mail: info@qsm.com

Sales, Training, and Product Information

Sales Information: 1 800 424-6755
Fax: 1 703 749-3795
E-mail: keith_ciocco@qsm.com
Web Site: <http://www.qsm.com>

Technical Support

Technical Phone Support: 1 800 424-6755
E-mail: support@qsm.com
Web site: <http://www.qsm.com/support/support-overview>

Index

A

Accept the License Terms 8, 25
Application Files 19

B

Before You Install 2

C

Choose a Destination Location
11
Contacting QSM 41
Customer Information 25

D

Deciding Between Network and
Local Installation 4
Documentation 13, 29

E

Enter Activation Codes 11, 27
Enter Customer Information
and Registration Code 9

F

Free E-mail and Telephone
Support 39

G

Granting Access to Workstation
Setup 18

H

Historic Trends Files 13

I

If you need to contact us: 41
Installing Required Library Files
6

Installing SLIM-Suite 10.1 to a
Network 16

L

License Files 22
License Information 3
License Updates 23

M

Maintaining SLIM-Suite 30
Managing Network Licenses 18
Minimum System
Requirements 1

N

Network Setup 16

P

PPM Framework 14, 30

Q

QSM Consulting Services 40
QSM Training 38

R

Running Version 10.1 in
Parallel with Previous
Versions of SLIM-Suite 3

S

Sample Files 13, 29
Select a Program Folder 14
Select Components to Install
12, 28
Sharing Workbooks and
Databases 5
SLIM-Control 10.1 22
SLIM-DataManager 10.1 20
SLIM-Estimate 10.1 20
SLIM-MasterPlan 10.1 21
SLIM-Metrics 10.1 21
SLIM-Suite Overview 1
Start Copying Files/Review
Settings 15

T

Template Files 13, 29
The Installation Process, Step
by Step 6

U

Uninstalling SLIM-Suite 34

W

Welcome Screen 8

What Gets Installed 19

What's Available? 37

Why Choose the Network
Install? 16

Workstation Setup 13, 17, 30