

## A guide to deploying the PQF Viewer in your Standard Operating Environment (SOE)

This document details the steps required to deploy Dolphin Software's PQF Viewer as part of your Standard Operating Environment (SOE).

The document deals first with background factors, outlines the three requirements for normal SOE deployment, covers the AutoFind feature, and lastly deals with setting the system up for the specific corporate email systems (Microsoft Outlook, IBM Lotus Notes, Novell GroupWise).

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## 1 Background

### 1.1 PQF Viewer Executables for email transport types

Currently there are 5 separate Windows based PQF Viewer executables, one for each major email transport type as follows

PQF-MAPIEx_V200.exe	Microsoft Outlook Professional
PQF-NOTES_V200.exe	IBM Lotus Notes
PQF-MAPI_V200.exe	Novell GroupWise
PQF-SMTP_V200.exe	Microsoft Outlook Express, Netscape Messenger, Pegasus, etc (SMTP)
PQF-HTTP_V200.exe	Browser based email – Yahoo, Hotmail, AOL, Gmail, etc

### 1.2 Licensing requirements

The PQF Viewer is provided at no charge. It can be freely copied, installed, emailed, placed on web sites for FTP downloads, etc, in either its raw executable form or in its InstallShield packaged form (available from [www.pqf.com](http://www.pqf.com)). The only stipulation is that the PQF Viewer's executable must be installed with its licence file ("PQF\_Viewer\_License.rtf"). Note: the InstallShield packaged form inherently installs the license file with the executable.

### 1.3 Location of the PQF Viewer Executable

The typical / default (using the InstallShield package) location for the PQF Viewer executable is the "C:\Program Files\DolphinSoftware\PQF Viewer" folder.

The executable folder should also contain the licence file ("PQF\_Viewer\_License.rtf") and the PQF Viewer's INI file.

### 1.4 Minimal impact on target PCs

The PQF Viewer uses an INI rather than registry settings to enable it to easily function on heavily 'locked down' systems.

The only reliance on registry settings for the PQF Viewer to function are the '\*.PQF' file extension shell (launch) registry entries (HKEY\_CLASSES\_ROOT) which enables the PQF Viewer to launch when a user double-clicks on a PQF file.

The PQF Viewer can reset its file extension '\*.PQF' shell launch settings if they are 'broken', by simply getting the user to run the PQF Viewer from the 'Start' menu. To enable this facility, PQF Viewer requires access to the HKEY\_CLASSES\_ROOT section of the registry.

This function may be inhibited through the PQF Viewer's INI settings if no access to the HKEY\_CLASSES\_ROOT section of the registry is preferred.

## 2 Normal SOE Deployment

For normal deployment the PQF Viewer requires 3 changes to the target system:

- 1) Start menu entry
- 2) '\*.PQF' file extension shell (launch) registry entries
- 3) PQF Viewer's INI file settings set to match the particular email transport used

### 2.1 Start Menu Entry

The PQF Viewer 'Start' menu entry is installed on an individual user basis rather than the 'All Users' or 'Default User' entries. The location of the 'PQF Viewer.LNK' (short-cut file) is therefore "C:\Documents and Settings\USER\_ID\Start Menu\Programs" (where 'USER\_ID' is the ID / name of the users account).

The 'PQF Viewer.LNK' short-cut file contains two properties:

- 1) Location of the Target - "C:\Program Files\DolphinSoftware\PQF Viewer\PQF\_XXXX.exe" where 'PQF\_XXXX.exe' is the particular email's PQF Viewer (see above).
- 2) Run as "Normal window"

### 2.2 The '\*.PQF' file extension shell (launch) registry entries

There are two entries required in the HKEY\_CLASSES\_ROOT section of the registry:

- 1) The file extension key ".pqf":
  - has the value "PortableQuestionnaireFormat.Document"
- 2) The document type's shell entry key "PortableQuestionnaireFormat.Document":
  - has the value "Portable Questionnaire Format Document"
  - has the sub-key "shell\open\command", which:
    - has the value "C:\PROGRA~1\DOLPHI~1\PQFVIE~1\PQF\_XX~1.EXE \"%1\""
    - or "C:\Program Files\DolphinSoftware\PQF Viewer\PQF\_XXXX.EXE \"%1\""where 'PQF\_XXXX.exe' is the particular email's PQF Viewer (see 1.5 above).

### Creating sample '\*.PQF' shell launch registry entries:

To generate the file extension '\*.pqf' shell (launch) registry entries:

- 1) Create the 'C:\Program Files\DolphinSoftware\PQF Viewer' folder
- 2) Copy in the following 3 files:
  - The PQF Viewer executable (PQF\_Notes32.exe).
  - The PQF Viewer's license (PQF\_Viewer\_License.rtf).
  - The PQF Viewer's profile file (PQF\_Notes32.INI).
- 3) Run the PQF Viewer executable with the following command line flag(s):
  - **/Register** causes the PQF Viewer to register its 'shell\open\command' location in the HKEY\_CLASSES\_ROOT section of the registry (see below for details). The /Register flag prints to the console the registry changes it makes.
  - **/Silent** used in conjunction with /Register inhibits printing the output to the console.

### 2.3 The PQF Viewer's INI file settings

The PQF Viewer's INI settings vary in accordance with the email transports the PQF Viewer is designed to work with.

This document details the main corporate email systems, IBM Lotus Notes and Microsoft Outlook (Professional version). Considerable work has been expended to enable the PQF Viewer to automatically diagnose the required settings for either of these transports. The Simple MAPI

version of the PQF Viewer can be easily set up to work with Novell's Groupwise, but the automatic diagnosis facility has not been written for Groupwise – if additional information is required contact [support@pqf.com](mailto:support@pqf.com).

### 3 The PQF Viewer's 'Auto-Find' Feature

The 'Auto-Find' feature is included to assist in SOE deployment, enabling the PQF Viewer to determine its own INI settings the first time it is run in the field.

#### IBM Lotus Notes

The PQF Viewer has an 'Auto-Find' feature that enables it to check a running IBM Lotus Notes client software session and determine where the 'Notes.INI' and the 'Nnotes.DLL' is located.

Our experience indicates that it is quite common for a PC to have multiple 'Notes.INI' files (several of which may be on the PATH), and we've also found the 'as installed' IBM Lotus Notes registry entries are often not updated by outsourcers and/or their sub-contractors, thus removing the registry entry's purpose of pointing to the correct 'Nnotes.DLL'. Our 'Auto-Find' feature takes care of all these problems, with the one caveat that the IBM Lotus Notes client software must be running for the 'Auto-Find' feature to do its job.

#### Microsoft Outlook (Professional)

The PQF Viewer has an 'Auto-Find' feature that enables it to check a running Microsoft Outlook (Professional) application session and determine where the 'MAPI32.DLL' is located.

#### WARNING

The 'Auto-Find' feature is not implemented on Win95 / Win98 and WinMe operating systems.

#### CAVEAT

The 'Auto-Find' feature only works if the email client (Microsoft Outlook or IBM Lotus Notes) is running when the PQF Viewer is launched.

### 3.1 Deploying the PQF Viewer so that it 'auto-finds' upon first use

#### SUGGESTION

The best way to ensure that IBM Lotus Notes or Microsoft Outlook is running when the PQF Viewer is launched is to email all the users a test PQF after the SOE deployment has occurred.

This will then cause the 'Auto-Find' to locate the required files ('Notes.INI' and 'Nnotes.DLL' for IBM Lotus Notes; 'MAPI32.DLL' for Microsoft Outlook) and place their locations in the PQF Viewer's INI file.

#### Requirements for 'Auto-Find' to function

There are two requirements for the PQF Viewer to launch and successfully run 'Auto-Find' :

- 1) The PQF Viewer INI settings are correctly set to cause the 'Auto-Find' feature to fire.
- 2) The '\*.PQF' shell launch settings are in the registry, so that the PQF Viewer executable will be launched when the user double-clicks on the PQF email attachment.

The suggested SOE PQF Viewer settings for implementing 'Auto-Find' for both Microsoft Outlook and IBM Lotus Notes are detailed in the appendices at the back of this document.

### 3.2 Action taken by PQF Viewer on encountering a later version of a PQF File

Each version of the PQF Viewer is 'aware' that it may encounter a newer version of its own file format. Previously V1.0 of the PQF Viewer issued a simple one line warning message that was able to be customised by the SOE implementers, controlled by the PQF Viewer's INI setting 'NewVersionMessage=' (see INI appendices below).

PQF Viewer V2.0 extends this facility by also sending a standard alert email to a customisable email address. The alert email contains a standard PQF Viewer response attachment as well as

equivalent body text information, so that the alert message may be automatically collated into any database, and/or read by a human being.

All parameters required to control the alert message are set by new PQF Viewer INI fields, all of which contain the prefix 'NewVersion' (see following and Appendix).

### **3.3 Impact on PQF Viewer when email application is upgraded**

Experience has taught that different outsourcers and their sub-contractors have many different ways of upgrading the corporate email application (Outlook/Notes/Groupwise). Therefore we recommend that the PQF Viewer's INI field 'AutoFindMailTransport' is set to a '1' rather than '2'. The '1' setting causes the PQF Viewer to run 'Auto-Find' every time it is launched. This is a minimal overhead and is the safest way to ensure that the PQF Viewer can adjust itself as the corporate email application is upgraded. NOTE: when 'AutoFindMailTransport' is set to a '1' the PQF Viewer will run 'Auto-Find' only if the email transport application is running, else it will use the existing PQF Viewer INI settings.

### **3.4 Impact on PQF Viewer when email application is changed**

If the corporate email application is changed from Notes to Outlook, or Outlook to Notes, the previous PQF Viewer (oriented to the previous email transport) will be unable to run with the new email application and the PQF Viewer will fail. At the point of transition from the old email application to the new email application the appropriate PQF Viewer must be installed, and its INI settings need to be set to 'Auto-Find' the new settings.

Most importantly, the '\*.PQF' shell registry settings must be switched to point to the newly installed PQF Viewer, otherwise the previous PQF Viewer will be 'fired' when the user double clicks on a PQF file.

## 4 Recommended PQF Viewer .INI settings

Below are the typical PQF Viewer .INI settings recommended by Dolphin Software. For detailed settings (see Appendix).

### 4.1 For IBM Lotus Notes SOE 'PQF\_Notes32.INI' settings:

In the [Viewer\_Options] Section – set as follows:

```
Reinstallation=0
AutoFindMailTransport =1
RunningAsPartOfSOE=1
InhibitRegistryUpdate=0
NewVersionMessage=Please contact the Help Desk on .....
NewVersionAlertEmailName =HelpDesk
NewVersionAlertEmailAddress =HelpDesk@outsourcer.com
NewVersionAlertEmailSubject = PQF Viewer - New Version Encountered Alert Message
NewVersionAlertInstructions =Contact ....., Check procedure #xxxx
```

In the [Viewer\_Transport] Section – set as follows:

```
PQF_EmailTransportType1=2
PQF_EmailTransportInstall=0
```

In the [Version] Section – set as follows:

```
PQF_EmailTransportType=2
PQF_EmailTransportSubType=0
```

### 4.2 For Microsoft Outlook SOE 'PQF\_MAPIEx.INI' settings:

In the [Viewer\_Options] Section – set as follows:

```
Reinstallation=0
AutoFindMailTransport =1
RunningAsPartOfSOE=1
InhibitRegistryUpdate=0
NewVersionMessage=Please contact the Help Desk on .....
NewVersionAlertEmailName =HelpDesk
NewVersionAlertEmailAddress =HelpDesk@outsourcer.com
NewVersionAlertEmailSubject = PQF Viewer - New Version Encountered Alert Message
NewVersionAlertInstructions =Contact ....., Check procedure #xxxx
```

In the [Viewer\_Transport] Section – set as follows:

```
PQF_EmailTransportType1=1
PQF_EmailTransportInstall=0
```

In the [Version] Section – set as follows:

```
PQF_EmailTransportType=1
PQF_EmailTransportSubType=11
```

## Appendix: Detailed PQF Viewer .INI file entries

### 1. PQF Viewer's INI file entries for IBM Lotus Notes

The following table details the parameters used in the PQF Viewer's INI file for an IBM Lotus Notes system.

[Viewer_Options]		
*	<b>Reinstallation = 0</b>	If '1', forces a new configuration run when program started - should always be '0' in SOE install as SOE install uses 'AutoFindMailTransport' feature – see below
*	<b>InhibitRegistryUpdate = 0</b>	If '1', forces a branch around the ".PQF" file-extension shell execute registry update - should always be '0' in SOE install unless program access to HKEY_CLASSES_ROOT section of registry is locked-out, in which case the ".PQF" file-extension shell execute entries in the registry must be correctly set by the outsourcer <u>prior to the first run of the PQF Viewer executable</u> (which typically initiates the 'Auto-Find' routines).
*	<b>AutoFindMailTransport = 1/2</b>	If '1', causes 'auto-find' to run every time, but if 'auto-find' fails to find IBM Lotus Notes running it will use the previous INI settings - useful for IBM Lotus Notes LapTop users for different 'Locations', or if IBM Lotus Notes changes are pending, or if maintenance subies are unreliable or for any system instability(minimal overhead involved in running 'auto-find' every time PQF Viewer starts;  If '2', causes 'auto-find' to run once and if successful reset itself to '0' and write its profile file - typically set to '1' in SOE install - only set to '2' if nothing is likely to change.
+	<b>NewVersionMessage =</b>	If empty, issues the standard PQF file newer version found message: "Please contact your administrator for the latest PQF Viewer."  Insert a single line message for user action to take if a newer version of a PQF file is encountered (ie "Phone HelpDesk xxx etc")
+	<b>NewVersionAlertEmailName =</b>	Used in conjunction with 'NewVersionAlertEmailAddress'. If empty 'NewVersionAlertEmailAddress' is used as the name.
+	<b>NewVersionAlertEmailAddress =</b>	If empty, will send alert email to pqf.com, else will send an alert email message to this address (with 'NewVersionAlertEmailName' used as name) and to pqf.com (unless contraindicated by the 'NewVersionNoAlertToDolphin' flag).
+	<b>NewVersionAlertEmailSubject =</b>	If empty, uses the standard email alert subject line : "PQF Viewer - New Version Encountered Alert Message"  Insert a single line for a custom email alert subject if required.
+	<b>NewVersionAlertInstructions =</b>	Default is blank. Insert a single line of text for a custom additional instructions if required - ie an internal direction to contact xxxxxx in dept zzzzzzz, or phone extension nnnnnnn, or don't forget to xxxxxxxx, etc, etc
	<b>NewVersionNoAlertToDolphin = 0</b>	If set to '1', no email alert will be sent to Dolphin Software staff via pqf.com. Note, however that this flag is ignored if the 'NewVersionAlertEmailAddress' field is empty - ie an email alert must be sent to someone if a newer version of the PQF document is encountered.
*	<b>RunningAsPartOfSOE = 1</b>	If '1' inhibits the 'auto-find' Wizard if problems occur on start-up - should always be '1' in SOE install.

[Viewer_Transport]		
*	<b>PQF_EmailTransportType1 = 2</b>	'2' = Notes
	PQF_EmailTransportType2 = -1	Not Used
	PQF_EmailTransportType3 = -1	Not Used

* <b>PQF_EmailTransportInstall = 0</b>	If '1' forces a new configuration run when program started – should always be '0' in SOE install.
PQF_EmailTransportPath =	Not Used

<b>[Version]</b>	
PQF_ReleaseDate = 24-Jul-2003	Release Date of executable - Informative only - <b>Read but not used by application</b>
PQF_FileVersion = 1.00	PQF File Version level expected - Informative only - <b>Read but not used by application</b>
PQF_ViewerVersion = 1.02.00	Version of executable - Informative only - <b>Read but not used by application</b>
PQF_DocumentVersion = 61	PQF File Version internal structure code expected - Informative only - <b>Read but not used by application</b>
* <b>PQF_EmailTransportType = 2</b>	'2' = Notes
* <b>PQF_EmailTransportSubType = 0</b>	'0' = Default Sub-Type

<b>[NOTES_Library]</b>	
<b>Library32Path = C:\Lotus\Notes</b>	Location of the 'NNOTES.DLL'
<b>VimUseRegistryPath = 1</b>	If '1' indicates registry entry for the location of the 'NNOTES.DLL' is correct; if '0' then the 'VimUseAdditionalPath' should be set to '1'
<b>VimUseAdditionalPath = 0</b>	If '1' indicates the 'VimAdditionalPath' contains the location of the 'NNOTES.DLL'
<b>VimAdditionalPath =</b>	If VimUseAdditionalPath = '1' then 'VimAdditionalPath' contains the location of the 'NNOTES.DLL' (if the Registry is incorrect)
<b>ActualLibraryDLL = nnotes.dll</b>	Name of the required DLL file – always ' <b>Nnotes.DLL</b> '

<b>[NOTES_Ini_File]</b>	
<b>IniUseExistingPath = 0</b>	If 1 indicates the PATH environment variable contains the path to the 'NOTES.INI' file; if 0 then the 'IniUseAdditionalPath' should be set to 1
<b>IniUseAdditionalPath = 1</b>	If 1 indicates the 'IniAdditionalPath' contains the location of the 'NOTES.INI'
<b>IniAdditionalPath = h:\data\notes</b>	If IniUseAdditionalPath = 1 then 'IniAdditionalPath' contains the location of the 'NOTES.INI' (if the PATH is incorrect)
<b>ActualIniFile = notes.ini</b>	Name of the required INI file - usually 'notes.ini'

<b>[NOTES_Server]</b>	
VIM_Server =	<b>Not Used by IBM Lotus Notes or Microsoft Outlook Viewers</b> - Only used by the SMTP and HTTP versions of the Viewer
VIM_ProgPath =	<b>Not Used by IBM Lotus Notes or Microsoft Outlook Viewers</b> - Only used by the SMTP and HTTP versions of the Viewer
ReplyAddress =	<b>Not Used by IBM Lotus Notes or Microsoft Outlook Viewers</b> - Only used by the SMTP and HTTP versions of the Viewer
DisplayName =	<b>Not Used by IBM Lotus Notes or Microsoft Outlook Viewers</b> - Only used by the SMTP and HTTP versions of the Viewer

* Required for auto-find to activate first time in field
+ Additional fields suggested for SOE install

## 2. PQF Viewer's INI file entries for MAPI

The following table details the parameters used in the PQF Viewer's INI file for an Microsoft Outlook (extended MAPI client) system.

[Viewer_Options]		
*	<b>Reinstallation = 0</b>	If '1', forces a new configuration run when program started - should always be '0' in SOE install as SOE install uses 'AutoFindMailTransport' feature – see below
*	<b>InhibitRegistryUpdate = 0</b>	If '1', forces a branch around the ".PQF" file-extension shell execute registry update - <u>should always be '0' in SOE install</u> unless program access to HKEY_CLASSES_ROOT section of registry is locked-out, in which case the ".PQF" file-extension shell execute entries in the registry must be correctly set by the outsourcer <u>prior to the first run of the PQF Viewer executable</u> (which typically initiates the 'Auto-Find' routines).
*	<b>AutoFindMailTransport = 2/1</b>	If '1', causes 'auto-find' to run every time, but if 'auto-find' fails to find Microsoft Outlook running it will use the previous INI settings; If '2', causes 'auto-find' to run once and if successful reset itself to '0' and write its profile file - typically set to '2' in SOE install (for Microsoft Outlook)
+	<b>NewVersionMessage =</b>	If empty, issues the standard PQF file newer version found message: "Please contact your administrator for the latest PQF Viewer." Insert a single line message for user action to take if a newer version of a PQF file is encountered (ie "Phone HelpDesk xxx etc")
+	<b>NewVersionAlertEmailName =</b>	Used in conjunction with 'NewVersionAlertEmailAddress'. If empty 'NewVersionAlertEmailAddress' is used as the name.
+	<b>NewVersionAlertEmailAddress =</b>	If empty, will send alert email to pqf.com, else will send an alert email message to this address (with 'NewVersionAlertEmailName' used as name) and to pqf.com (unless contraindicated by the 'NewVersionNoAlertToDolphin' flag).
+	<b>NewVersionAlertEmailSubject =</b>	If empty, uses the standard email alert subject line : "PQF Viewer - New Version Encountered Alert Message" Insert a single line for a custom email alert subject if required.
+	<b>NewVersionAlertInstructions =</b>	Default is blank. Insert a single line of text for a custom additional instructions if required - ie an internal direction to contact xxxxxx in dept zzzzzzz, or phone extension nnnnnnn, or don't forget to xxxxxxxxx, etc, etc
	<b>NewVersionNoAlertToDolphin = 0</b>	If set to '1', no email alert will be sent to Dolphin Software staff via pqf.com. Note, however that this flag is ignored if the 'NewVersionAlertEmailAddress' field is empty - ie an email alert must be sent to someone if a newer version of the PQF document is encountered.
*	<b>RunningAsPartOfSOE = 1</b>	If '1' inhibits the 'auto-find' Wizard if problems occur on start-up - should always be '1' in SOE install.

[Viewer_Transport]		
*	<b>PQF_EmailTransportType1 = 1</b>	'1' = MAPI
	<b>PQF_EmailTransportType2 = -1</b>	Not Used
	<b>PQF_EmailTransportType3 = -1</b>	Not Used
*	<b>PQF_EmailTransportInstall = 0</b>	If '1' forces a new configuration run when program started – should always be '0' in SOE install.
	<b>PQF_EmailTransportPath =</b>	Not Used

[Version]	
PQF_ReleaseDate = 5-Sep-2005	Release Date of executable - Informative only - <b>Read but not used by application</b>
PQF_FileVersion = 2.00	PQF File Version level expected - Informative only - <b>Read but not used by application</b>
PQF_ViewerVersion = 2.00.00	Version of executable - Informative only - <b>Read but not used by application</b>
PQF_DocumentVersion = 61	PQF File Version internal structure code expected - Informative only - <b>Read but not used by application</b>
* PQF_EmailTransportType = 1	'1' = MAPI
* PQF_EmailTransportSubType = 11/12	'11' = Outlook / '12' = GroupWise

[MAPI_Library]	
<b>Library32Path =</b> %windir%\System32	Location of the 'MAPI32.DLL'
<b>MapiUseRegistryPath=1</b>	If '1' indicates registry entry for the location of the 'MAPI32.DLL' is correct; if '0' then the 'MapiUseAdditionalPath' should be set to '1'
<b>MapiUseAdditionalPath=0</b>	If '1' indicates the 'MapiAdditionalPath' contains the location of the 'MAPI32.DLL'
<b>MapiAdditionalPath=</b>	If MapiUseAdditionalPath = '1' then 'MapiAdditionalPath' contains the location of the 'MAPI32.DLL' (if the Registry is incorrect)
<b>ActualLibraryDLL=</b> <i>mapi32.dll</i>	Name of the required DLL file - always 'MAPI32.DLL'

[MAPI_Ini_File]	
<b>IniUseExistingPath = 1</b>	<b>Not Used By MAPI</b> - Only here for compatibility with IBM Lotus Notes version
IniUseAdditionalPath = 0	<b>Not Used By MAPI</b> - Only here for compatibility with IBM Lotus Notes version
IniAdditionalPath =	<b>Not Used By MAPI</b> - Only here for compatibility with IBM Lotus Notes version
ActualIniFile = <i>mapi32.ini</i>	<b>Not Used By MAPI</b> - Only here for compatibility with IBM Lotus Notes version

[MAPI_Server]	
MAPI_Server = %windir%\System32	<b>Not Used by IBM Lotus Notes or Microsoft Outlook Viewers</b> - Only used by the SMTP and HTTP versions of the Viewer
MAPI_ProgPath =	<b>Not Used by IBM Lotus Notes or Microsoft Outlook Viewers</b> - Only used by the SMTP and HTTP versions of the Viewer
ReplyAddress =	<b>Not Used by IBM Lotus Notes or Microsoft Outlook Viewers</b> - Only used by the SMTP and HTTP versions of the Viewer
DisplayName =	<b>Not Used by IBM Lotus Notes or Microsoft Outlook Viewers</b> - Only used by the SMTP and HTTP versions of the Viewer

* Required for auto-find to activate first time in field
+ Additional fields suggested for SOE install