



# Quidgest

## INSTALLATION MANUAL

# gen:o



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# 1 Welcome

## What is Genio?

It is an Agile platform for modeling and automatic generation of integrated information systems, in different architectures and languages such as MVC, HTML 5, Java, C ++ or C #. Based on methodologies such as MDD (Model Driven Development), RAD (Rapid Application Development), and DevOps, it is a helpful solution to develop complex, unique and urgent projects.

## What makes us innovative?

Genio allows functional specialists, independently of their domain of programming, to build and support information systems through a graphical interface with a high level of abstraction. It combines technological independence, code patronization, and delivery speed in multiple technologies.

It produces easily evolutive, multi-language, and multi-currency systems. The generated code is standard and completely independent of the generation platform. Conceived especially for non-programmers, allows analysts to materialize sophisticated management and engineering processes.

## Benefits

- Up to 10 x faster developing new projects with 1/10 of resources.
- Ease evolving maintenance and integration of new requirements.
- Independence of software providers and technologies.
- Interoperability with other manufacturers and brands.
- Ability to update obsolete platforms with innovative methodology.
- Permanent technological and functional updates.
- Productivity is 8 times higher than low code platforms

## How this document works

This document is an aid to conducting the installation of the Genio facilities. Genio develops for native code and uses it as a database aggregator the most used database engine today. Thus, we will have to resort to procedures described and they must be performed by you in the order represented here.

We wish an excellent work and take advantage of all the potential of the Genio platform.

## 2 Computer minimum requirements

For optimal functioning of Genio, it should be installed on a computer with the following characteristics:

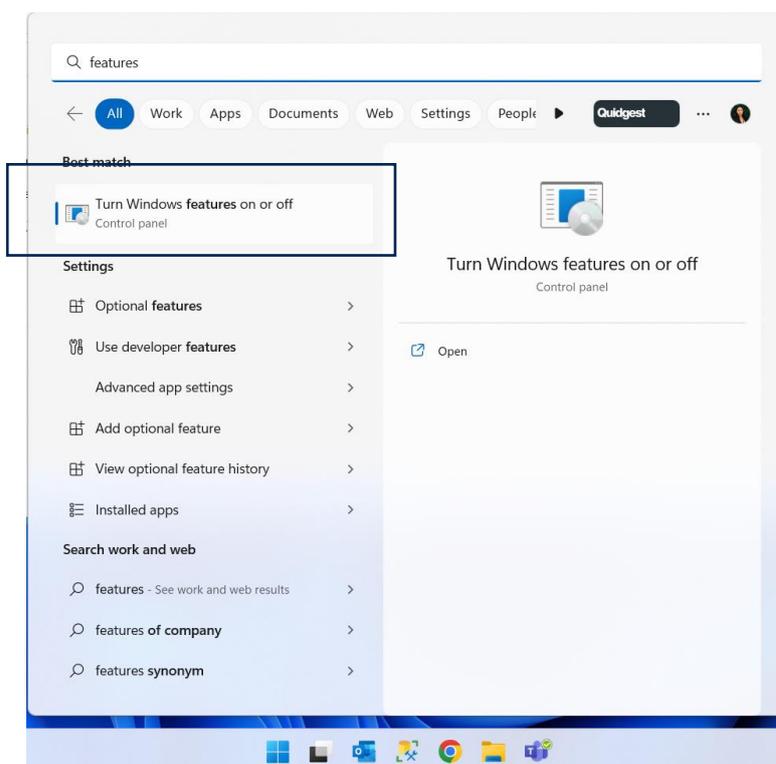
- Microsoft Windows 10
- 8GB RAM
- I5 or equivalent
- 40GB free disk space
- Internet connection

## 3 Windows Features

To improve performance, windows 11 has many features disabled because most users don't need them in their daily lives.

Therefore, it is necessary to enable several features. Check below the marked features and compare with yours.

- First, you should search for “features” in windows.



## Windows Features

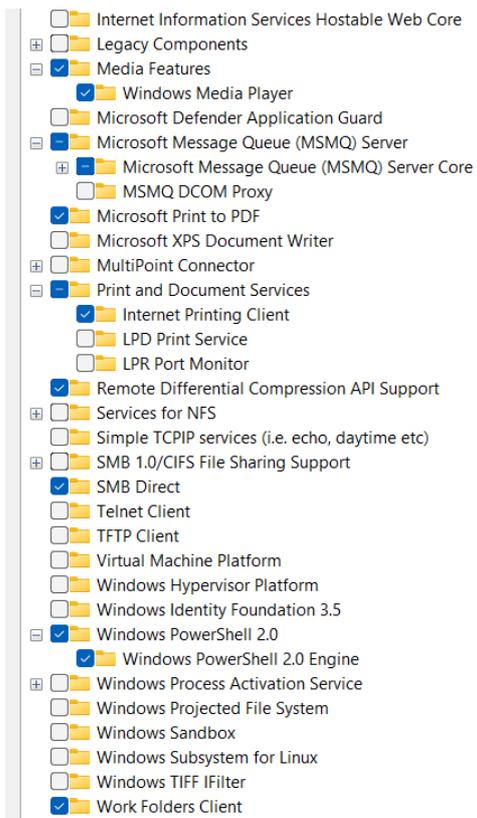
### Turn Windows features on or off

To turn a feature on, select its check box. To turn a feature off, clear its check box. A filled box means that only part of the feature is turned on.

- .NET Framework 3.5 (includes .NET 2.0 and 3.0)
  - Windows Communication Foundation HTTP Activation
  - Windows Communication Foundation Non-HTTP Activation
- .NET Framework 4.8 Advanced Services
  - Active Directory Lightweight Directory Services
  - Containers
  - Data Center Bridging
- Device Lockdown
  - Guarded Host
- Hyper-V

- Internet Information Services
  - FTP Server
  - Web Management Tools
    - IIS 6 Management Compatibility
      - IIS 6 Management Console
      - IIS 6 Scripting Tools
      - IIS 6 WMI Compatibility
      - IIS Metabase and IIS 6 configuration compatibility
    - IIS Management Console
    - IIS Management Scripts and Tools
    - IIS Management Service
  - World Wide Web Services
    - Application Development Features
      - .NET Extensibility 3.5
      - .NET Extensibility 4.8
      - Application Initialization
      - ASP
      - ASP.NET 3.5
      - ASP.NET 4.8
      - CGI
      - ISAPI Extensions
      - ISAPI Filters
      - Server-Side Includes
      - WebSocket Protocol

- World Wide Web Services
  - Application Development Features
  - Common HTTP Features
    - Default Document
    - Directory Browsing
    - HTTP Errors
    - HTTP Redirection
    - Static Content
    - WebDAV Publishing
  - Health and Diagnostics
    - Custom Logging
    - HTTP Logging
    - Logging Tools
    - ODBC Logging
    - Request Monitor
    - Tracing
  - Performance Features
    - Dynamic Content Compression
    - Static Content Compression
  - Security
    - Basic Authentication
    - Centralized SSL Certificate Support
    - Client Certificate Mapping Authentication
    - Digest Authentication
    - IIS Client Certificate Mapping Authentication
    - IP Security
    - Request Filtering
    - URL Authorization
    - Windows Authentication



- After validation and installation of all features, **restart your computer.**

## 4 Visual Studio Setup

GENIO produces fully readable source code and project files which can be used in many Integrated Development Environments (IDEs) depending on the technologies used for development.

Building and compiling MVC solutions require Microsoft Visual Studio (VS). Currently, it is possible to use both versions, 2019 and 2022, however, we would recommend using the latest version.

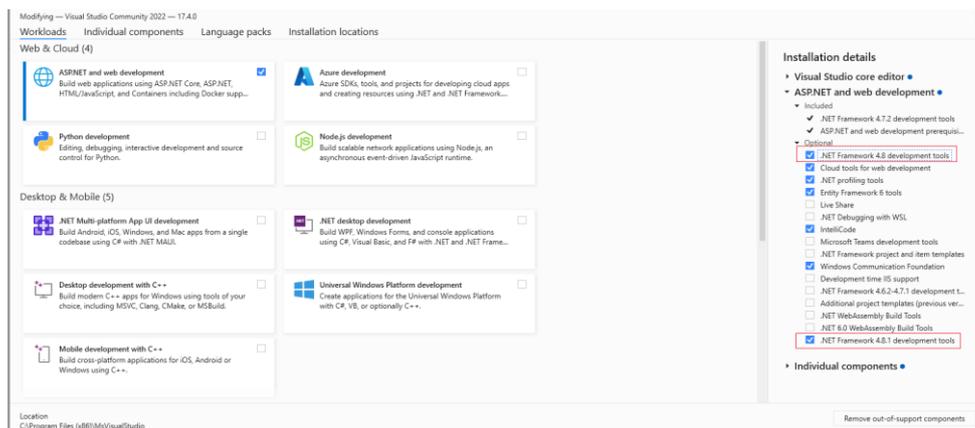
For educational and testing purposes the VS2022 Community Edition is available at the following address:

<https://visualstudio.microsoft.com/thank-you-downloading-visual-studio/?sku=Community&channel=Release&version=VS2022&source=VSLandingPage&cid=2030&passive=false>

### 4.1 ASP.NET MVC

After opening the VS setup program, select the "**ASP.NET and web development**" option in the upper left corner.

In the "**Installation Details**" area on the right sidebar, please **check** the **.NET Framework developments tools** options above version 4.8.



### 4.2 .NET 6.0

If you are using Visual Studio 2022 (v17.3), you should download this release of .NET 6.0.

.NET 6 unifies the SDK, base libraries, and runtime across mobile, desktop, IoT, and cloud apps.

The download is available at <https://dotnet.microsoft.com/en-us/download/dotnet/thank-you/sdk-6.0.403-windows-x64-installer>.

## 5 Node.js

Genio solutions need Node.js to compile all libraries of the project. Currently, the recommendation is versions above 16 and below 17.

Version 16.18.1 can be downloaded at:

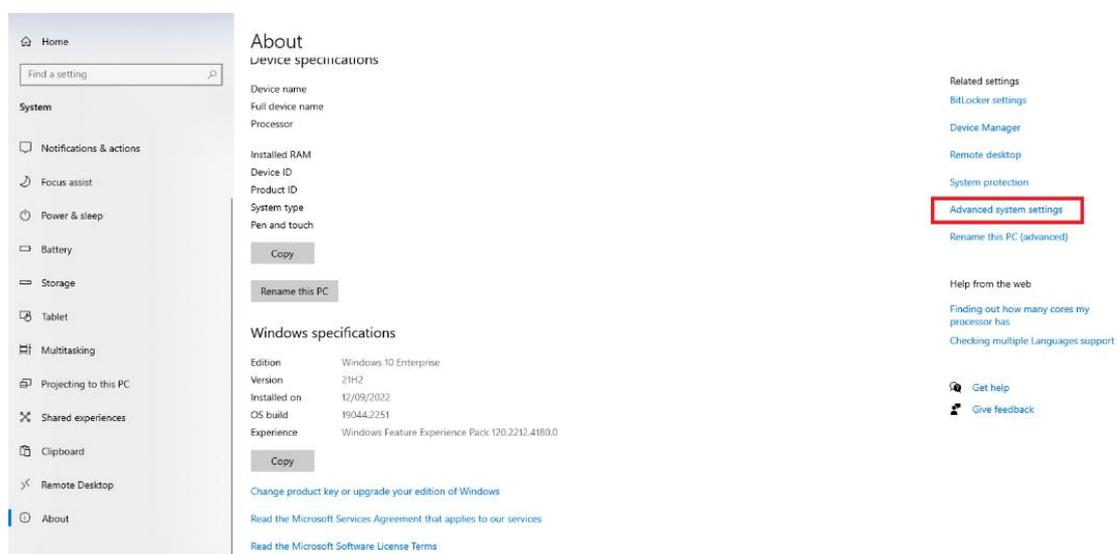
- <https://nodejs.org/download/release/v16.18.1/node-v16.18.1-x64.msi> (x64)
- <https://nodejs.org/download/release/v16.18.1/node-v16.18.1-x86.msi> (x32)

For other releases go to <https://nodejs.org/en/download/releases/> and choose another version.

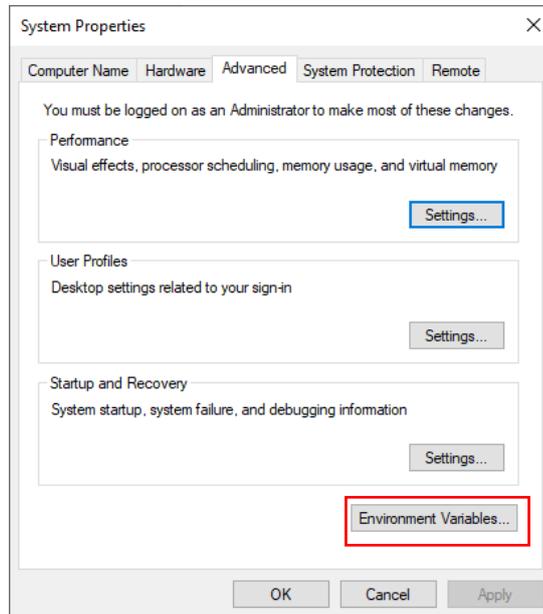
Note: After installation, it is mandatory to restart the computer.

### 5.1 Add node path to the Environment Variables

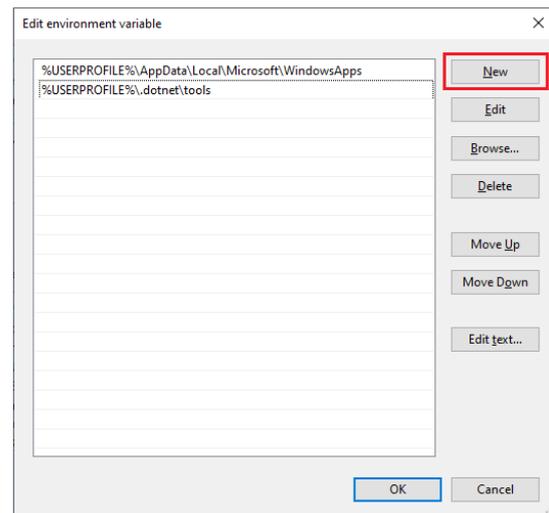
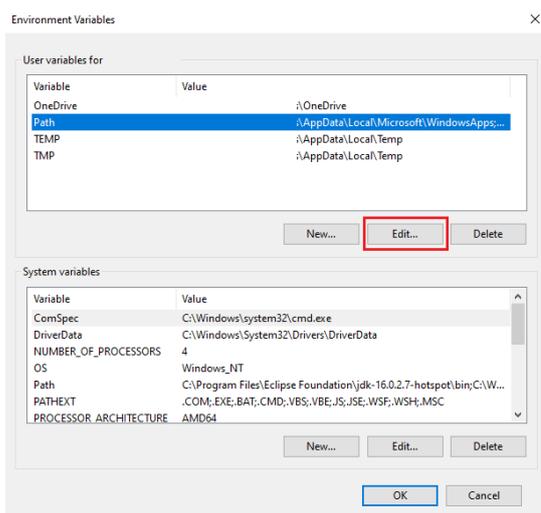
It is a good practice add the node path to the variables. In windows start button search for “Environment Variables” or go to Settings->System->About and Select “Advanced System Settings”.



In the System Properties windows, click on “Environment Variables...” button, you can follow in the figure bellow.



Select “Path” and click in the “Edit” button. Then, add a new variable with the value %USERPROFILE%\AppData\Roaming\npm



## 5.2 Genio Versions lower 290.04

For Genio versions lower than 290.04, only Node.js versions 10.0.0 to 13.9.0 can be used.

Version 13.9.0 of Node.js can be downloaded from the following link:

- <https://nodejs.org/download/release/v13.9.0/node-v13.9.0-x64.msi> (x64)
- <https://nodejs.org/download/release/v13.9.0/node-v13.9.0-x86.msi> (x32)

# 6 Quidgest Setup

This installation program developed by Quidgest installs some dependencies necessary to run our applications.

The installation program can be downloaded at [https://quidgest.net/DownloadFiles/Setups\\_3.0.8.zip](https://quidgest.net/DownloadFiles/Setups_3.0.8.zip).

## 6.1 Requirements

Before beginning installation:

- You must have **administrator privileges** (local or network).
- **All applications** in Windows must be **closed**.

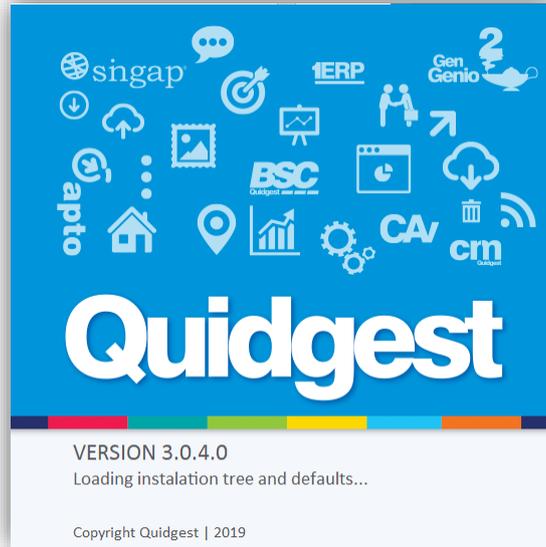
## 6.2 Procedure

### 6.2.1 Local Directory

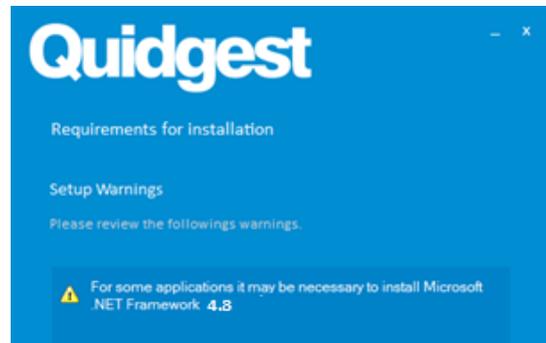
Once the [file](#) has been downloaded, it must be unzipped. Make sure you do not make any changes to the folder structure.

### 6.2.2 Installation Program

Run the file "QuidSetups.exe".

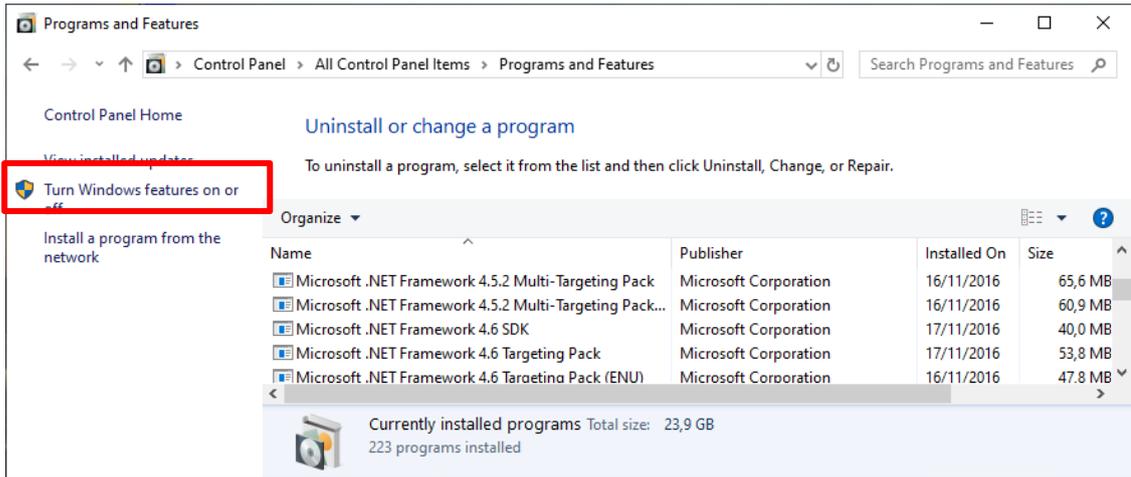


Quidgest solutions require the .NET Framework 4.8. If the message in the image appears (in figure below), please make sure you have .NET 4.8 successfully configured.

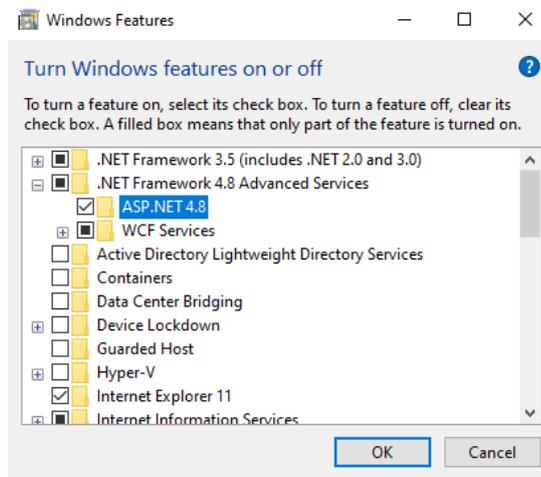


#### 6.2.2.1. Configure .NET 4.8

The feature should be activated on Control Panel->Programs and Features->Turn Windows features on or off".



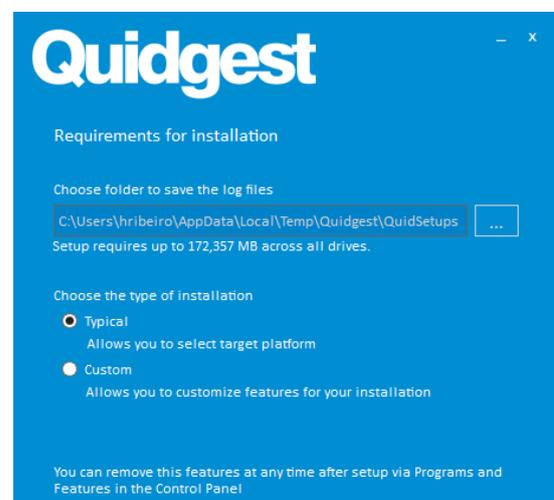
Search for **.NET Framework 4.8 Advanced Services** and check ASP .NET 4.8 checkbox.



### 6.2.3 Installation Mode

Ongoing installation, you can either configure the log file, or keep the default.

You should keep the **"Typical"** installation option.



#### 6.2.4 Installation Machine Type

Quidgest systems can be installed in:

- Client machines: Only for customers with solutions using native Windows applications.
- Server machines: To run on servers where Quidgest solutions are installed.



You should select both options (“Client” and “Server”).

#### 6.2.5 Client and Server options

There are 4 options below to select from:

- Other: Requirements for all platforms such as Microsoft Report Viewer.
- Backoffice: Windows Applications.
- MVC: Web applications that use MVC technology.
- Web: Other web applications.



You should **select all options**: Other, Backoffice, MVC and Web.

#### 6.2.6 Installation

Based on our previous selection it will be given a detailed listing of the components that will be installed on our server. Check if everything is all right and you can start the installation process by clicking on “Install” button.

After installation, you can close the window by clicking on “Close”.

## 7 SQL Server 2019

Genio is compatible with SQL Server 2008 R2 or later. However, it is advised to always use the latest version of SQL Server. You can get a free **Developer edition** of Microsoft SQL Server 2019 here: <https://www.microsoft.com/pt-pt/sql-server/sql-server-downloads>.

Scroll down a bit on the page and select the Developer option to be downloaded.

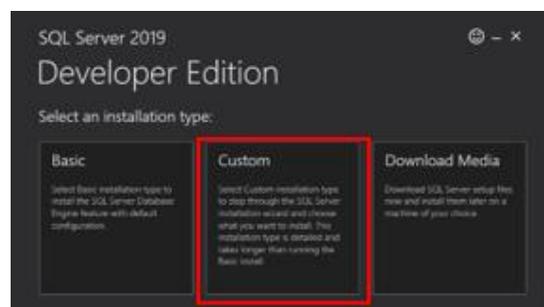


Developer

O SQL Server 2019 Developer é uma edição integral gratuita, licenciada para utilização como base de dados de desenvolvimento e teste num ambiente de não produção.

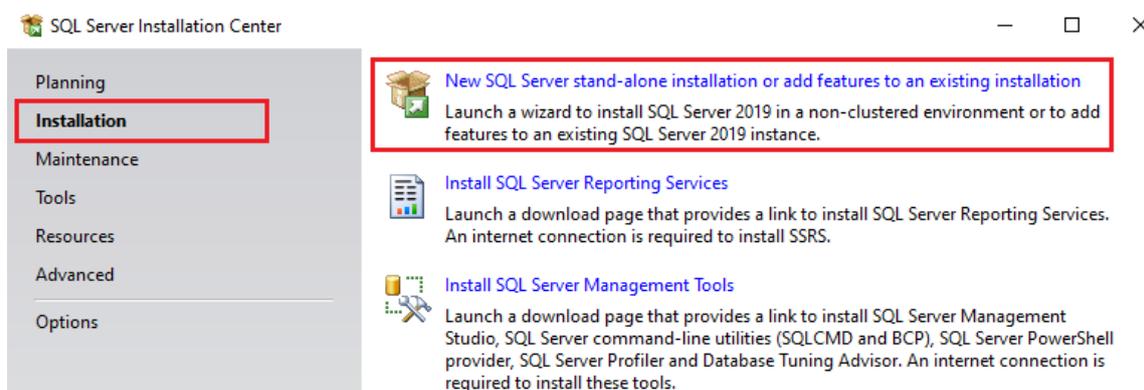
Faça download agora >

After running the **SQL2019-SSEI-Dev.exe** file, you should select the **Custom** option.



Keep media location as C:\SQL2019 and press install. This may take a few minutes. Now the SQL installation center window will open.

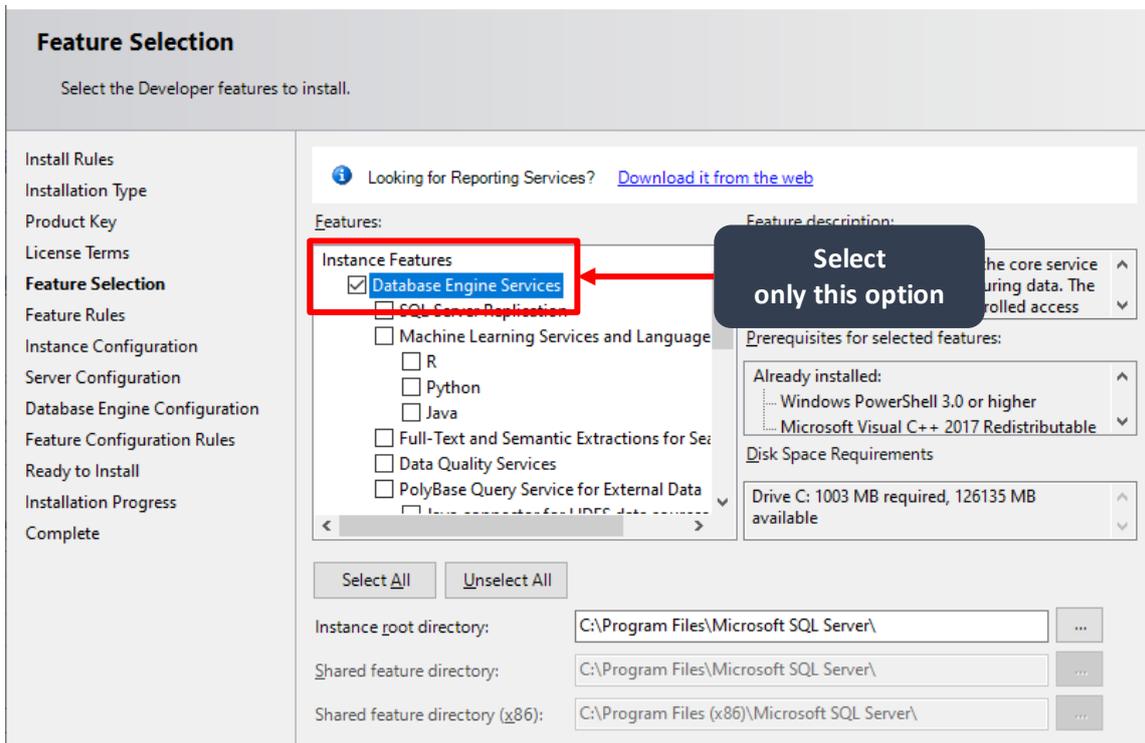
On the top left menu, click on the installation tab and select **New SQL Server stand-alone installation**.



When installing SQL Server, use the default setup options except when noted below.

## 7.1 Feature Selection

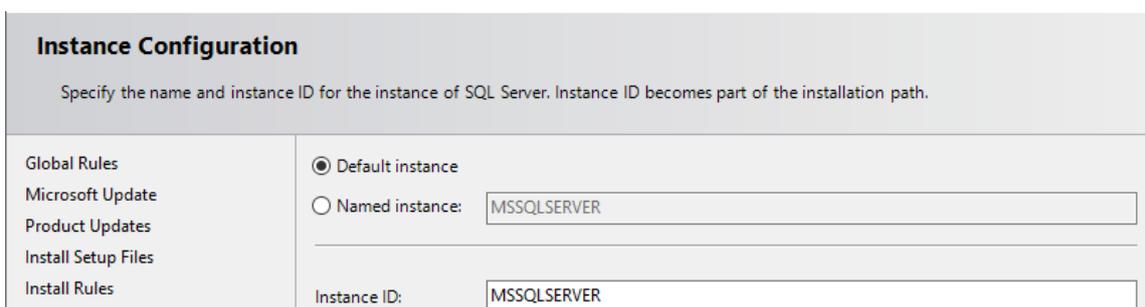
There are many features that you can add at your server instance, however for Genio we just will need the first option, the “**Database Engine Services**” option.



## 7.2 Instance Configuration

By default, a computer does not have any server instance installed, in this case you should maintain the “**Default instance**” option selected. With this selection the server instance name will assume the same name as the computer [COMPUTERNAME] (E.g., CURIOSITY).

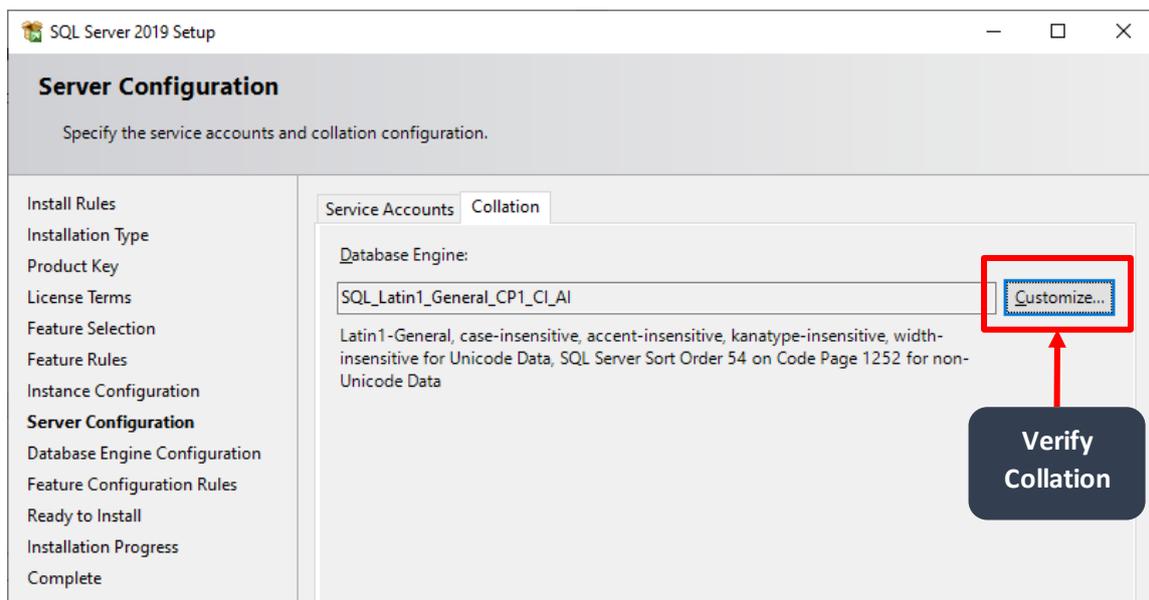
If you already have a server instance previously installed, choose the “**Named Instance**” option, and type a new name. The suggestion is “QUIDGEST[YEAR]” (E.g., QUIDGEST2022). In the end, the full name of your server is “[COMPUTERNAME]\QUIDGEST[YEAR]” (E.g., CURIOSITY\QUIDGEST2022)



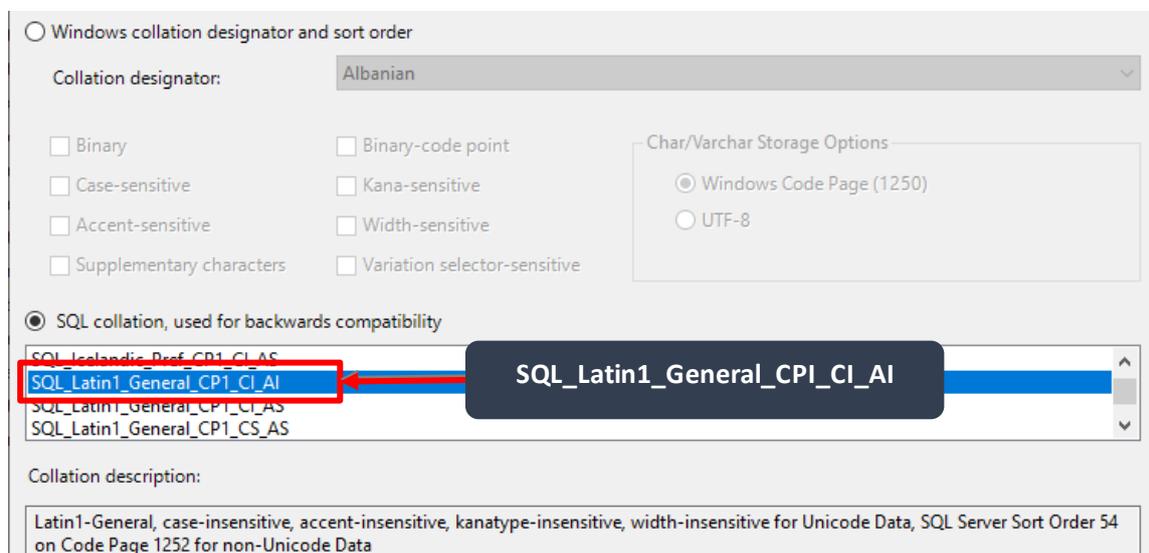
### 7.3 Server Configuration / Collation

SQL Server collation refers to a set of character and character encoding rules. Genio uses "SQL\_Latin1\_General\_CP1\_CI\_AI", this means:

- Latin makes the server treat strings using ascii.
- CPI uses the Code Page 1252.
- CI is case-insensitive ("ABC" is equal to "abc").
- AI is accent-insensitive ("á" is equal to "a").



Make sure that you **choose the correct option**. This setting makes it easy to search for data because data entry is subject to many accentuation errors.



## 7.4 Database Engine Configuration

### 7.4.1 Server Configuration

In the first tab, "Server Configuration", you should select in the Authentication Mode area, the **Mixed Mode** option, so that third-party SQL applications can access the databases created therein.

The password here is based on the default user "sa" - it must have **fifteen characters, including capital and small letters as well as numbers (don't use special characters)**. This is **only for configuration** and installation, not for normal use.

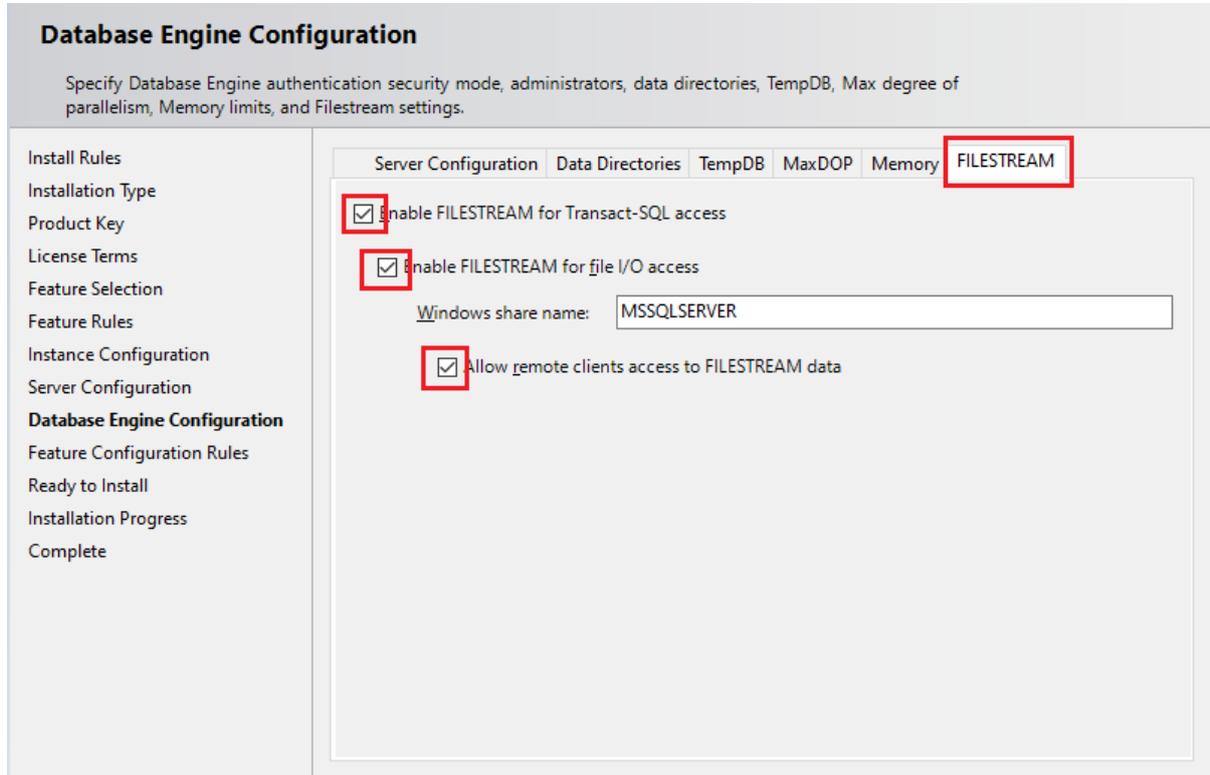
Also, **add yourself (Add Current User)** as SQL Server administrator.

The screenshot shows the "Database Engine Configuration" wizard. The "Server Configuration" tab is selected and highlighted with a red box. The "Authentication Mode" section has the "Mixed Mode (SQL Server authentication and Windows authentication)" option selected, also highlighted with a red box. Below this, there are two password input fields for the SQL Server system administrator (sa) account, both containing masked characters. At the bottom, the "Add Current User" button is highlighted with a red box. A note on the right states: "SQL Server administrators have unrestricted access to the Database Engine."

### 7.4.2 Filestream

In the “FILESTREAM” tab of this form, select the technologies to be used for document recording.

You should select **all** the options and make sure you do not change the windows share name.



### 7.5 Next Steps and Successful Installation Confirmation

Before the installation begins, you will be **presented with a summary** of all settings that will take effect during the installation of SQL Server.

After several minutes installing the configuration previously defined, you will get the **successful installation confirmation**.

## 8 Microsoft SQL Server Management Studio

SQL Server Management Studio (SSMS) is an integrated environment for managing any SQL infrastructure. We use SSMS to query, design, and manage your databases and data warehouses on your local computer.

In other words, to have access to the local server database, it is necessary to have this tool installed locally.

You can find the download of **Microsoft SQL Server Management Studio (SSMS)** at <https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-ver16>

### Download SSMS

To download SSMS 19 Preview 2, visit [Download SSMS 19](#).

 [Free Download for SQL Server Management Studio \(SSMS\) 18.12.1](#)

SSMS 18.12.1 is the latest general availability (GA) version. If you have a previous installed, installing SSMS 18.12.1 upgrades it to 18.12.1.

Click here

- Release number: 18.12.1
- Build number: 15.0.18424.0
- Release date: June 21, 2022

For the installation, you should follow the wizard setup with the default settings.

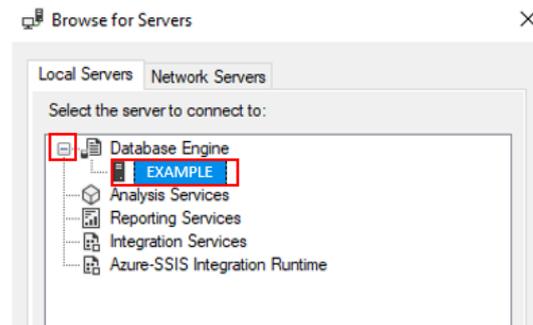
### 8.1 Opening SSMS

Once installed, search for “SSMS” on your task bar and open it.

In the popup box that appears, click on the dropdown field of “Server name”, and select “browse for more” as shown in the follow figure:



You should select the **server instance name** configured before. If you just have one server instance, it should have the same name as the computer.



## 8.2 Creation of Database User

Now you need to create your **User Master Credentials** in the SQL database. The User master credentials are very important, you will use them both on SSMS and on Genio, so it is advisable that you save these credentials in a notepad file or write them in a notebook. Later, you can change the password if you choose to.

**For the Master Username:** please do not use numbers or special characters.

**For the Master Password:** please create a password according to the following conditions of complexity:

- 10 characters long.
- At least one capital letter and one small letter.
- At least one number.
- At least one special character.
  - IMPORTANT NOTE: **do not use any of the following special characters** (as the lead to errors on Genio):
    - < – (less than sign)
    - > – (greater than sign)
    - & – (and sign)
    - ' – (apostrophe or single quote)
    - " – (double quote)

There are two ways to create your **User Master Credentials** in the SQL database: by query or manually. See steps for both options below.

### 8.2.1 By query

To allow the system access to SQL Server, the Quidgest user with administration privileges must be created. For this purpose, the following query must be executed:

```
USE [master]

GO

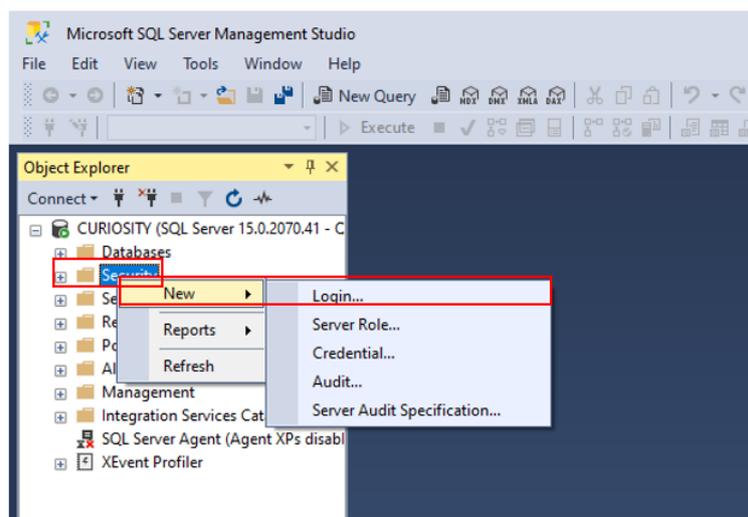
CREATE LOGIN [set_a_MasterUsername] WITH PASSWORD =
N'<set_a_MasterPassword>', DEFAULT_DATABASE=[master], CHECK_EXPIRATION=OFF,
CHECK_POLICY=OFF;

GO
```

**Note:** You must keep the password entered here so that the system can be configured to respond with it. This password will be set instead of <set\_a\_MasterPassword> in the previous query.

### 8.2.2 Manually

On the top left menu of the program, right-click on the Security section and chose the option “new” followed by “new login” as shown in the image:



In the General section, type a Login name (**Master Username**) and change the authentication type from “Windows authentication” to “SQL Server Authentication”:

Select a page

- General
- Server Roles
- User Mapping
- Securables
- Status

Script Help

Login name:  Search...

Windows authentication

SQL Server authentication

Password:

Confirm password:

Then, type a **Password (Master Password)** and **Confirm with the same Password**.

**Note:** create a password according to the conditions of complexity mentioned before:

Select a page

- General
- Server Roles
- User Mapping
- Securables
- Status

Script Help

Login name:  Search...

Windows authentication

SQL Server authentication

Password:

Confirm password:

The options to enforce the password policy should be **unchecked**.

Select a page

- General
- Server Roles
- User Mapping
- Securables
- Status

Script Help

Login name:  Search...

Windows authentication

SQL Server authentication

Password:

Confirm password:

Specify old password

Old password:

Enforce password policy

Enforce password expiration

User must change password at next login

Confirm the default language is “English – us\_english”.

The screenshot shows the 'General' properties page for a user in SQL Server Enterprise Manager. The left sidebar contains a 'Select a page' menu with options: General, Server Roles, User Mapping, Securables, and Status. Below this are sections for 'Connection' (Server: CURIOSITY, Connection: QUIDGEST, View connection properties) and 'Progress' (Ready). The main area is titled 'Script' and 'Help'. It contains fields for 'Login name:' with a search button, and authentication options: 'Windows authentication' (unselected), 'SQL Server authentication' (selected), 'Mapped to certificate', 'Mapped to asymmetric key', and 'Map to Credential'. There are also checkboxes for 'Specify old password', 'Enforce password policy', 'Enforce password expiration', and 'User must change password at next login'. A 'Mapped Credentials' table is shown with columns 'Credential' and 'Provider'. At the bottom, 'Default database:' is set to 'master' and 'Default language:' is set to 'English - us\_english', which is highlighted with a red box.

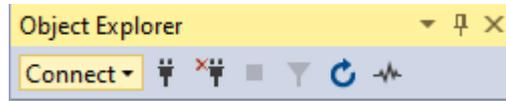
In the Server Roles section, it is necessary give more permissions to the master user. For that, you should select the “sysadmin” option.

The screenshot shows the 'Server Roles' section in SQL Server Enterprise Manager. The left sidebar has 'Server Roles' selected. The main area contains the text 'Server role is used to grant server-wide security privileges to a user.' and a list of server roles with checkboxes: bulkadmin, dbcreator, diskadmin, processadmin, public, securityadmin, serveradmin, setupadmin, and sysadmin. The 'sysadmin' checkbox is checked and highlighted with a red box.

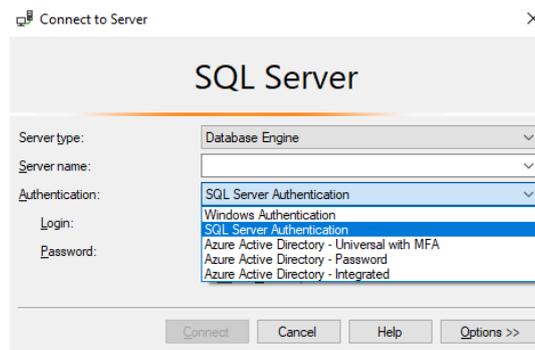
### 8.3 Testing credentials

It is important to test if the credentials are working well, because SSMS will always use these credentials.

You can use the buttons in the Object Explorer to Logout  and Login .



Please change the authentication from Windows Authentication to **SQL Server Authentication**.

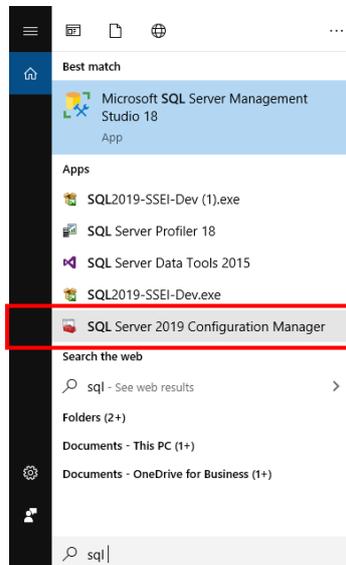


You must login with the credentials entered previously. If you logged in **successfully** you can close SSMS, otherwise login again with the windows user (Windows Authentication), edit the previously created login and change the password (this should solve the problem).

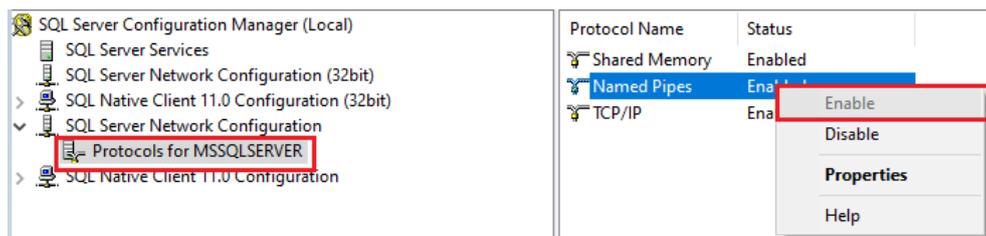
## 8.4 Enabling Named Pipes and TCP/IP

To ensure an optimized and flexible connection between the system and the database, protocol bindings should be enabled.

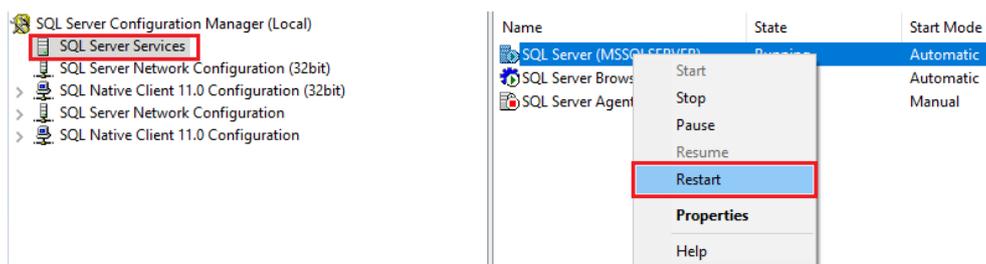
Open SQL Server 2019 Configuration Management program.



In SQL Configuration Manager, select the SQL Server instance and choose Enabled both for Named Pipes and for TCP/IP.



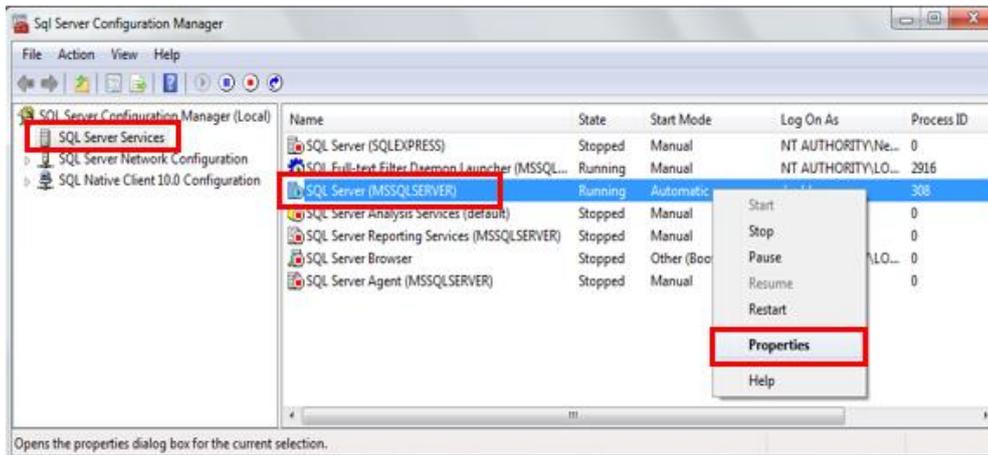
Then you should restart the service. For that, you select the SQL Server Services menu, choose your instance, and **restart** the service.



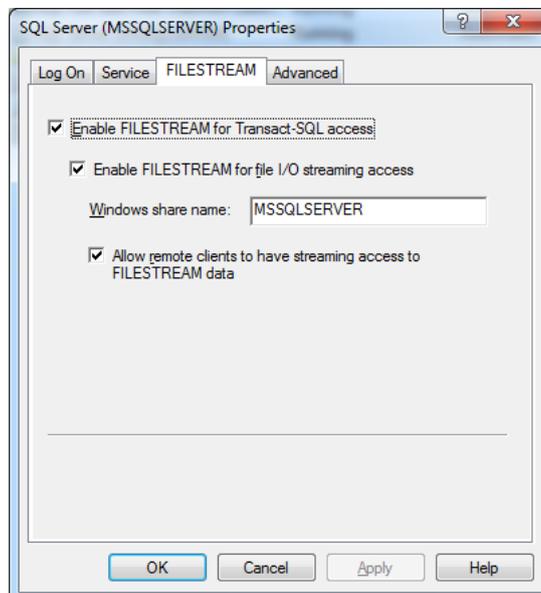
## 8.5 Filestream Check (In Case of an Error)

If FILESTREAM related issues occur in the first system run, check the settings.

In SQL Server Configuration Manager select the SQL Server instance and choose properties.



In the FILESTREAM tab confirm that **all options are selected**.



## 9 GENIO Setup

### 9.1 Download Genio setup and License file

It is recommended to run the GENIO installer as an administrator.

1. Start by creating a folder on your Local Disk (C:) to save Genio in, name this folder **Quidgest**.
2. Within this folder, create a new folder and name it, **Projects**.
  - 2.1. This is necessary because the Projects folder cannot be set as the same folder where GENIO will be installed.
3. To get access to the **Genio Setup (.exe)** file (used to install Genio), you must first Go to <https://quidgest.net:8080/genio/login> and click on **register now**. (\*)

#### Register your account!

Get access to the latest Genio platform. You can get a free licence key to start exploring Genio.

Register now

4. Now, login to QuidNet using the credentials you just registered.
5. Click on the **GENIO tab** and press download on the **most up-to-date version of Genio** (the most recent date).
6. Please save this Genio version inside your **Quidgest** folder.
7. Then go to the **MY LICENSES** tab.
  - 7.1. Please give a brief explanation as to why you want to install Genio.
  - 7.2. Choose the 3 months option from the dropdown menu.
  - 7.3. Then click on the **request license** button to submit your request.
    - 7.3.1. You will receive an approval email if your request is accepted by Quidgest.
8. Once this email arrives, go back to the **My License** tab on QuidNet and download the license.
  - 8.1. Please save this license file in the **Quidgest** folder you created on your Local Disk (C:).

(\*) If you are participating in a training week, you received in your email credentials to Login in the Quidnet. You just need to **download the latest Genio version** (step 6) and **download the license file** (steps 8 and 8.1).

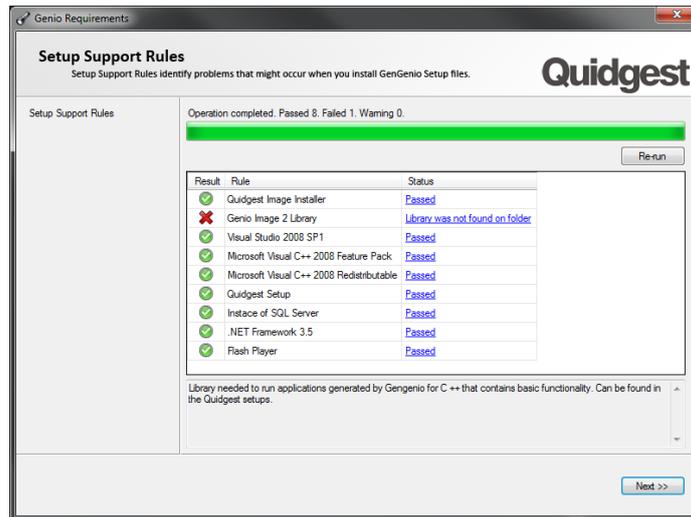
## 9.2 Installation

### 9.2.1 Genio requirements

The "Genio Requirements" window, which will appear before installation, will show if any other software is needed to install GENIO.

If any of the required software is not found, details will be given on how to install it.

**Note:** Nothing will prevent you from proceeding with the installation, even if required software is not installed.



## 9.3 DBMS Access Configuration and Privileges

GENIO is based on structured data recording using Microsoft SQL server and requires you to enter details for a SQL server **instance** set to "Mixed Mode" and a user with privileges for database creation, schema management, function management, stored procedure and insert management, updates, and record deletion.

You should use the **server instance name** defined in [step of Instance Configuration](#) and the **Master User Credentials** you created on [step of Creation of Database User](#).

Communication options  
SQL Server name where you want to save your definitions

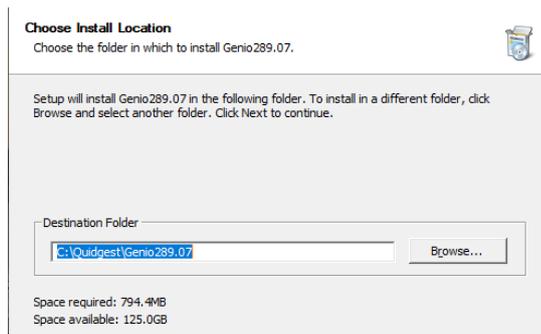
SQL Server name

Username \*

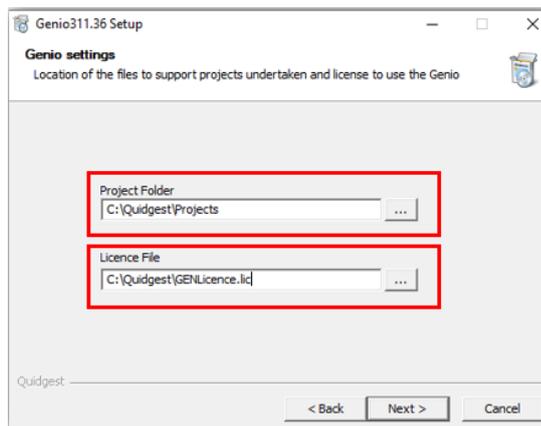
Password \*

Authentication credentials must exist in the DBMS used by Genio platform

Make sure the path where Genio is saved is **C:\Quidgest\Genio Version**. Then press next.



Now choose the folder **C:\Quidgest\Projects** as destination for Project Folder, and in the License field, paste the path: **C:\Quidgest\GENLicence.lic** then press next.



Finally click on install to start installing Genio.

Before the installation begins, you will be **presented with a summary** of all settings that will take effect during the installation of SQL Server.

After several minutes installing the configuration previously defined, you'll get the **successful installation confirmation** and Genio will run.

#### 9.4 Restart Your Computer

After all installations, all .exe files from .NET6, Node.js, SQL2019, SSMS and Genio, as also the zip file from QuidgestSetups can be deleted (Note: you have all this files in Downloads folder).

The you should **restart your computer**.

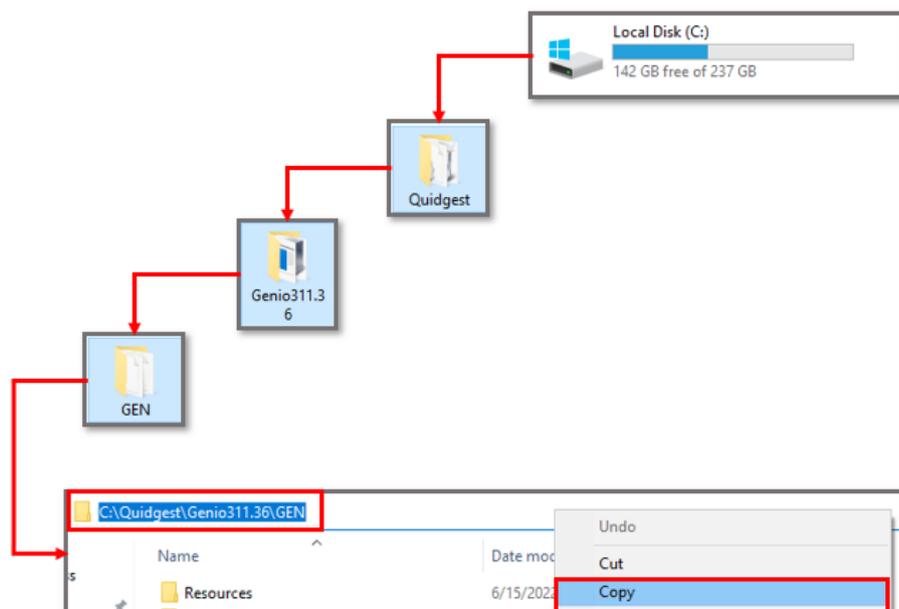
## 9.5 Reset Genio credentials (only if error appears)

If when trying to open Genio you get the following error “**An error has occurred when opening the Database for version verification!**”, this means you will have to reset your master login and password on Genio. Click on the “OK” button to close the error box.

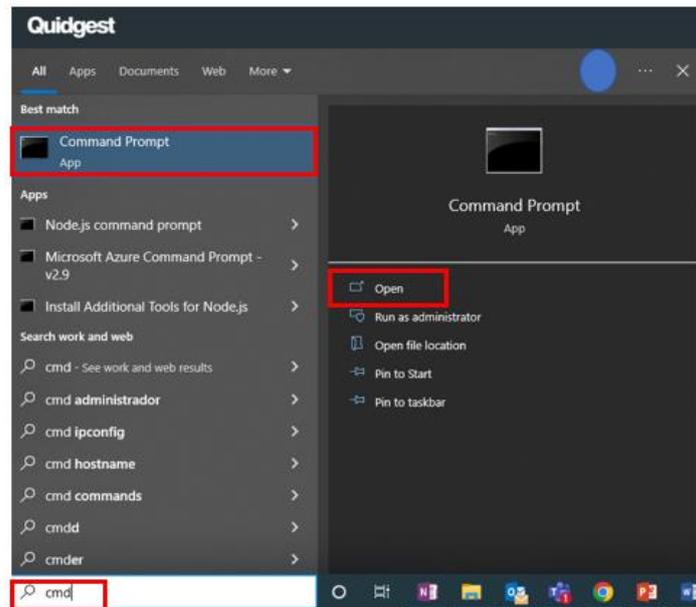


First, we need to copy the pathway of where your GEN folder is in, within the Genio Version you have installed (for guidance see image on the next page):

1. Open your local disk (C:) folder.
2. Now open the Quidgest folder.
3. Then open the Genio Version folder.
4. Next open the GEN folder.
5. Finally copy this pathway.

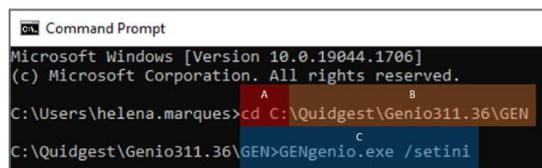


Now open the **Command Prompt** interface, by searching for **cmd** on the windows search bar.



Then the Command Prompt, please type the following:

1. Type: "cd" followed by a space.
2. Then paste the pathway of the GEN folder you copied, and press enter.
3. Type: "GENgenio.exe /setini" and press enter.



This will open a Genio credential setup interface in which you can put in your master login and password.



## 10 Installation Checklist

In the end of installation, you need to ensure that you have all these programs installed:

- [Visual Studio 2022 with ASP .NET MVC](#)
- [.NET 6.0](#)
- [Node.js](#)
- [SQL Server 2019](#)
- [SQL Server Management Studio](#)
- [Genio](#)

Contact for more information  
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