QualiWare Upgrade to 10.8

qualiware

Contents

Change log

Date	Change
01-12-2022	Version 1 of this document

1 About This Document

This document details the steps that must be taken when upgrading an older QualiWare installation to QualiWare 10.8. The audience for this document is technical consultants who are responsible for conducting the upgrade.

It is recommended to note repository configuration (metamodel, configurations, languages, user roles and permissions) and to backup all servers and databases before proceeding forward with the upgrade.

2 QEF Configurations

Upgrading QualiWare to 10.8 will reset all values in QEF Console under the Configuration tab. Any changes in the QEF Configuration tab must be re-applied after the upgrade.

3 QIS Bundle

The QIS Bundle has, until 10.8, included all the modules necessary for QEF besides QLM and QLM Documentation.

In 10.8, 2 modules have been separated from the QIS Bundle. These modules are the SharePointConnector (QdcBundle) and Taskscheduler (QtsBundle).

Figure 12: QdcBundle and QtsBundle has been separated from QisBundle

4   Shared Licenses

4.1   Sharing licenses between 10.8 and 10.5

QualiWare 10.8 uses a new approach to network communications, and existing 10.5 installations cannot share licenses with 10.8. The issue is to be solved by a patch for 10.5, to be released later.

4.2   Users and Groups License Sharing

Users and groups synchronized from Active Directory, Azure Active Directory or IdP have unique identifiers. These identifiers are the same across different instances of QualiWare. When assigning a such user to a per-user license from different instances by means of license sharing, only one slot from the license will be used.

Assignment in this case will only grant access to a given instance. This means that if we have two instances that are sharing licenses, both instances are synchronized with the same Azure Active Directory, and the same user account can have the same per-user license assigned from both instances. This will use only one slot from the license and grant access to both instances.

External groups, even though they also have the same identifiers across different instances of QualiWare and may contain users that have the license already assigned directly or through another group, do not behave in the same way as when users are assigned directly.

This means that the same group, assigned to a per-user license on two different instances, will use as many slots from the license as users it contains multiplied by the number of instances.

5   Access Logs in 10.8

5.1   New features

In QualiWare 10.5 and older, a single Access Logs data-source was created in for the whole installation.

In QualiWare 10.8, Access Logs are created at the repository level. The reason is to have fully separated repositories including Access Log.

In addition, a new feature is introduced in 10.8. This is a mechanism where the Access Logs are reduced to a certain configurable size. Two new QEF configurations are introduced, LogSizeLimit and LogTruncateCount. These settings can be changed in the QEF Configurations.

For details, please refer to the illustration:

	user@local) thus limiting user resolving logic to QEF local users only.		
LogSizeLimit	Maximum number of log records stored in data source. If this number is exceeded, the most old LogTruncateCount records are deleted and new ones are added to data source. Possible values: LogSizeLimit >= 2 (units - number of records).	Default 10000	🖉 ↩
LogTruncateCount	Number of log records to delete if log size limit is exceeded. This parameter must be greater than zero and less or equal to log size limit: 0 < LogTruncateCount < LogSizeLimit. (units - number of records).	Default 1000	🖉 ↩

Figure 3: Two new configurations

These two configurations count for all repositories in the installation. It should be noted that this implies that old access log records will be deleted.

For each repository in Repository Administrator, the Addon menu is reorganized. Access Log, GWE and SBW now have individual tabs.
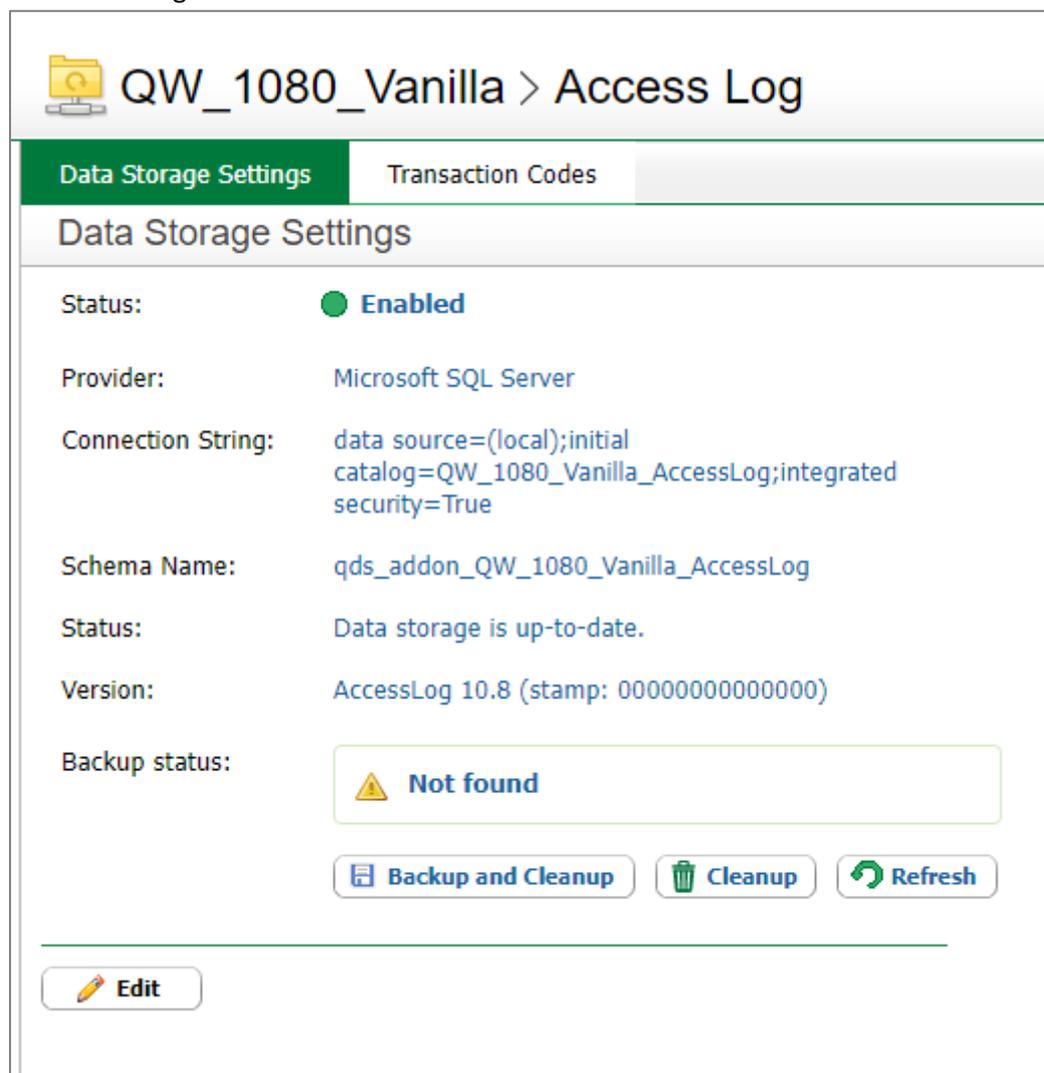
The Access Log tab looks like this:

Figure 4: Access log for each Repository

There are two new functions for Access Logs:

- **Backup** – generate a backup file of the access log, in the form of a CSV
- **Cleanup** – Perform a clean-up according to the QEF Configuration variables of Log Size Limit and Log Truncate Count
- **Refresh** – Refresh the screen and the content

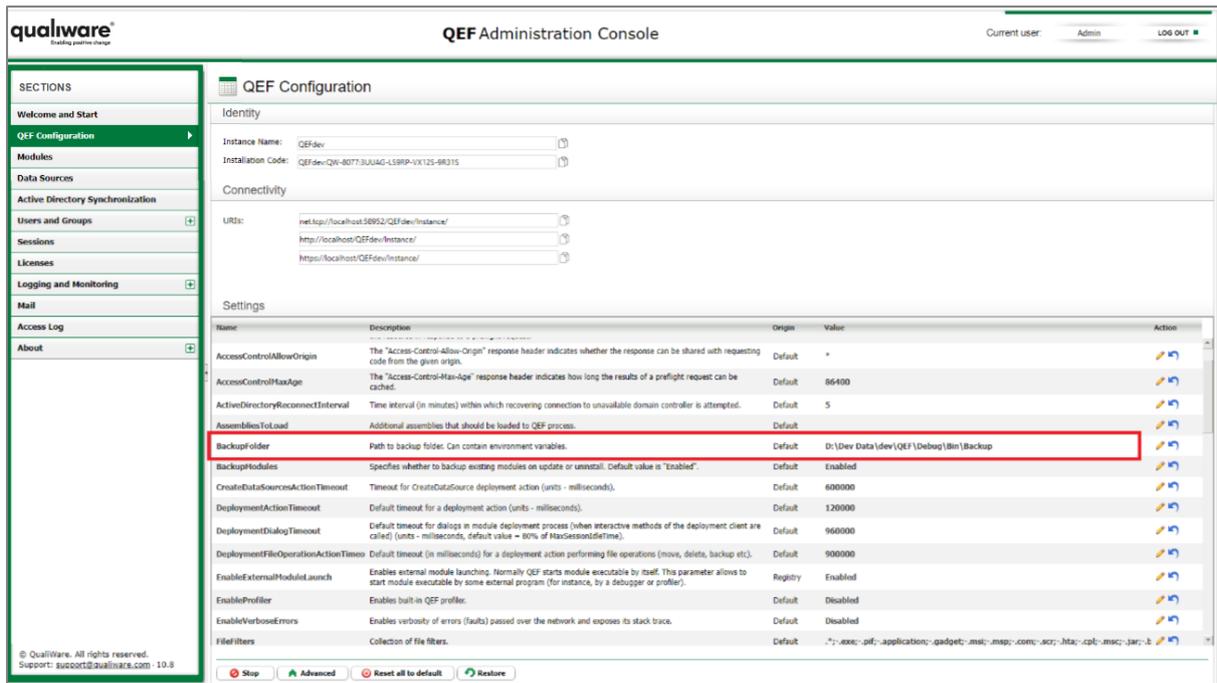"Backup and Cleanup" does both actions at once.
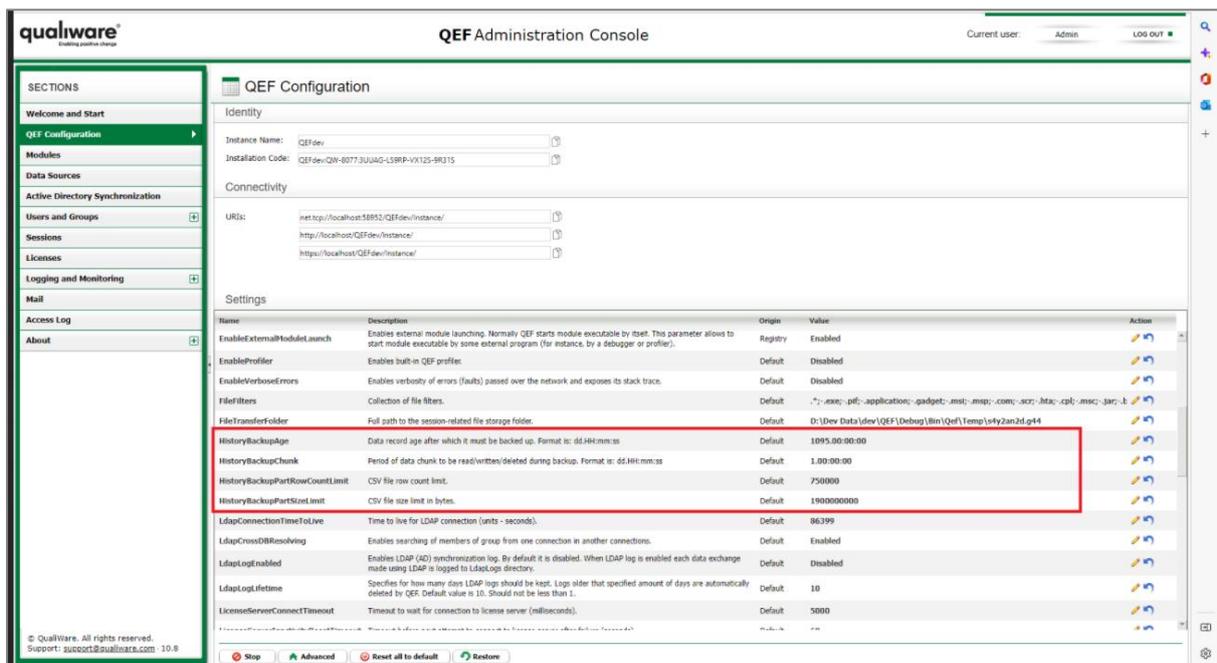
Figure 5: Configuration of the Backup part 1

Figure 6: Configuration of the Backup part 1

5.2 Upgrade steps for 10.8

When upgrade from any 10.X to 10.8, then an Access Log for each repository must be created. After this the migration function below must be executed:

To migrate Access Logs and SBW to 10.8, follow these steps:

1. Go to Repository Administrator and create the Access Logs repository data storage
2. Run the Import from QEF Log operation
3. Start QLM, execute the upgrade script and publish the repository
4. Run the following QCL script: `Print(AnlResetProceduresByLogLocation());`

The fourth step can be done by going to Tools -> Command Language -> Command in QLM and executing the Print statement above. The purpose of this is to update some functions related to SBW (Social Behavior Warehouse).

Here are the steps, in pictures, to migrate the Access Logs from 10.5 or earlier. These pictures represent the steps from 1 to 4 that is detailed above.

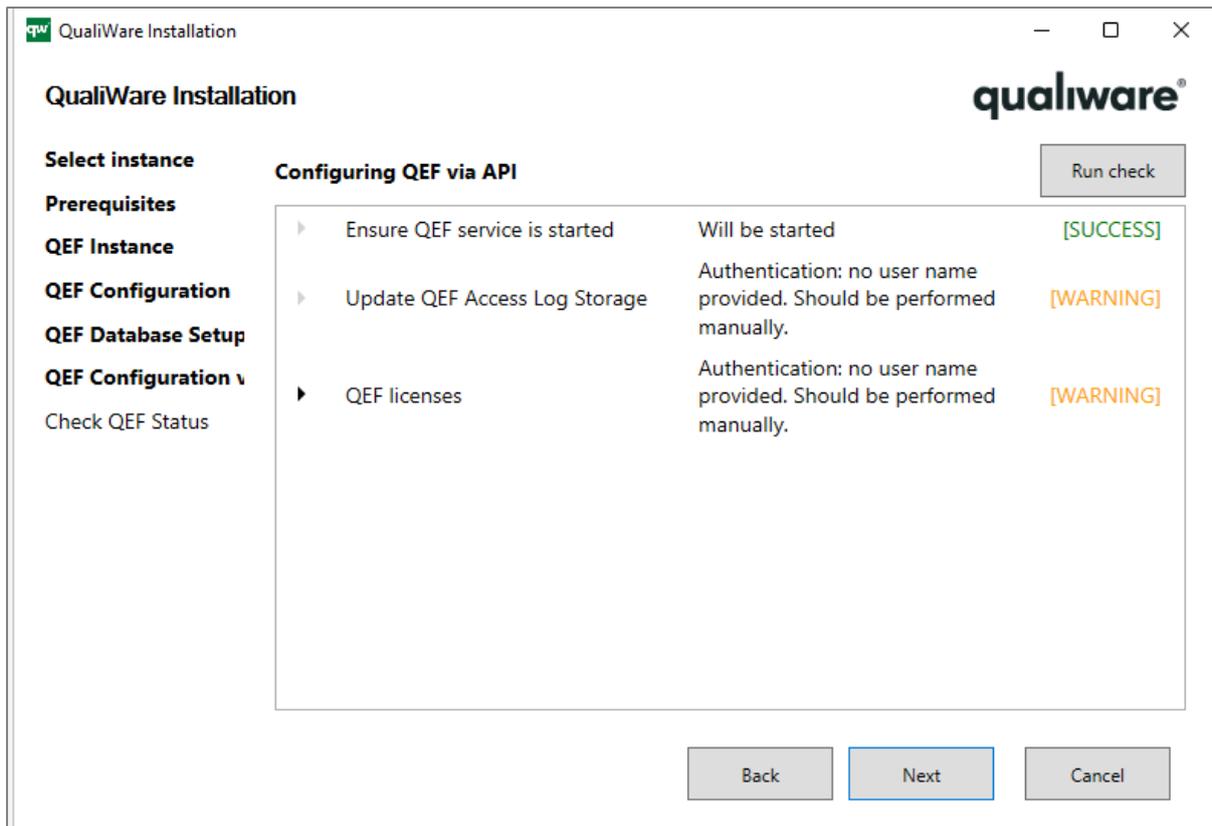When installing QEF, you will receive two warnings. Ignore them and click Next:

Figure 7: By QEF installation you will get warning on Access Logs due to the new concept in 10.8
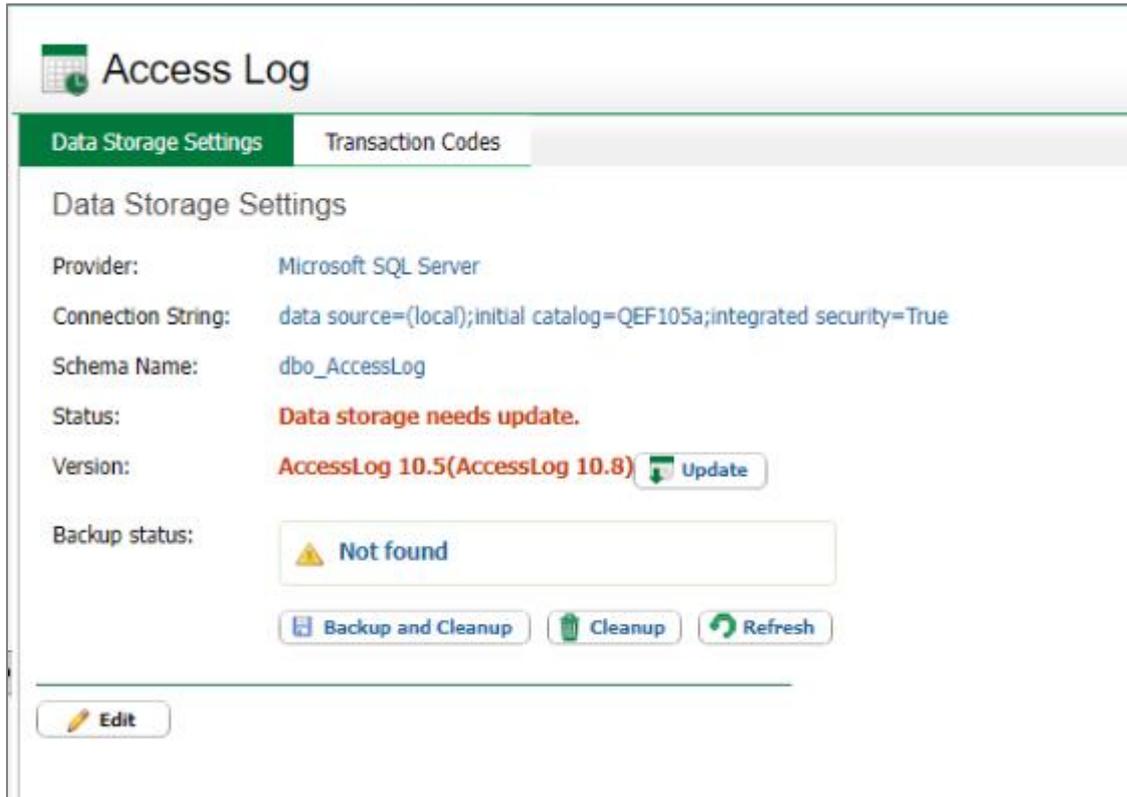
In QEF Console, update Access Logs:
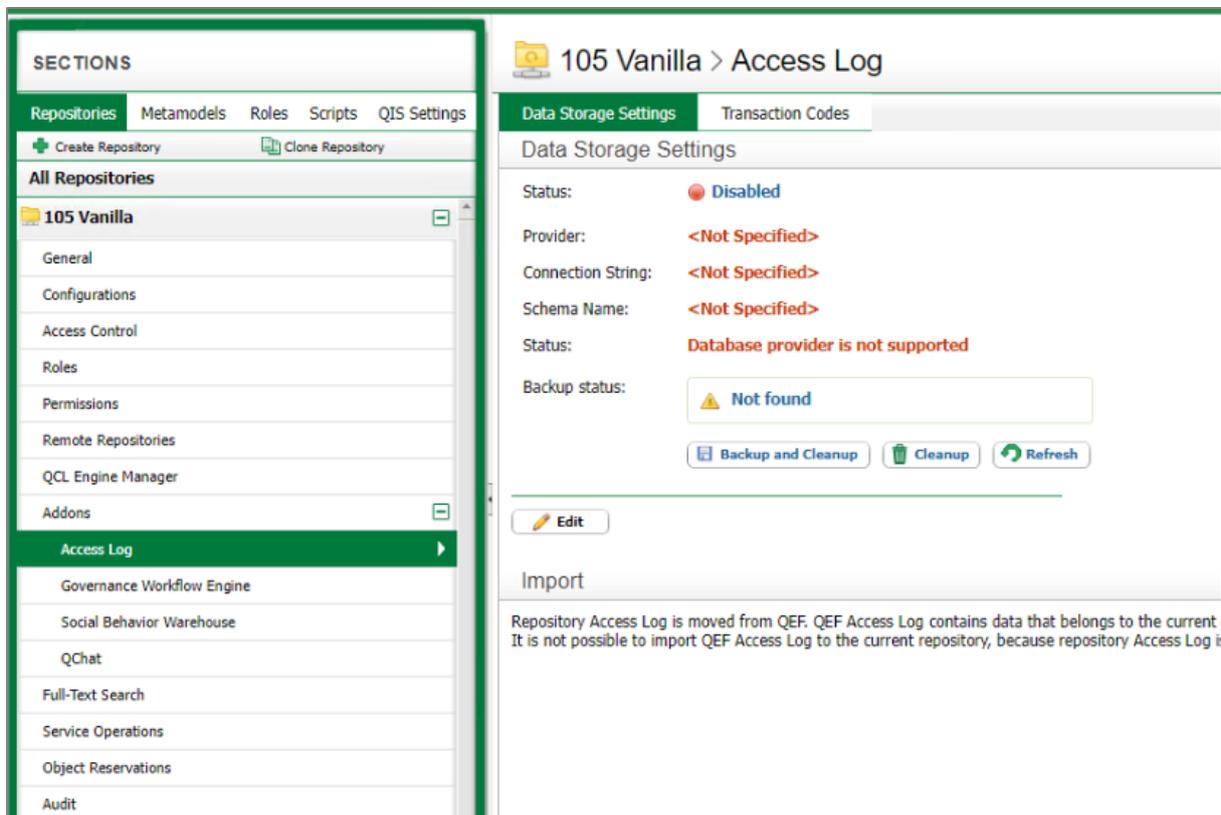

Figure 8: QEF Access Logs

Figure 9: In Repository Administrator, if Access Logs data storage does not exist, create it by using the Edit button

By default, the Access Logs will try to use the same database as the database for the repository. For production repositories, it is recommended to use a separate database.
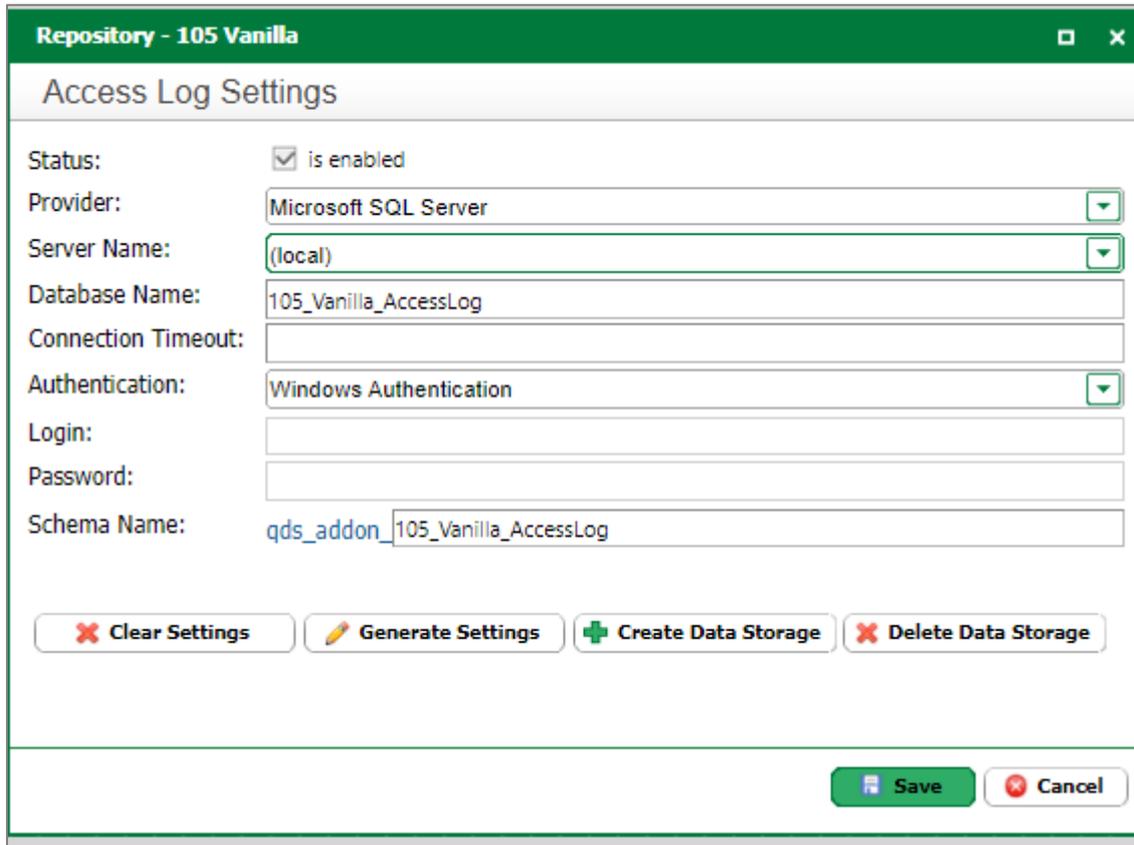

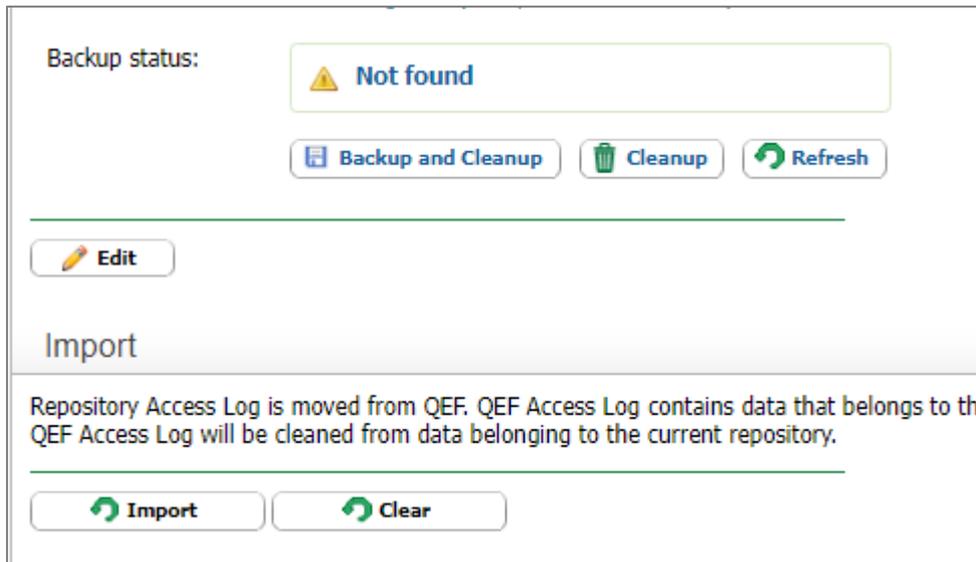*Figure 10: Create a separate database for Access Logs.*

Figure 11: Finally import data from orignal AccessLog

Import will clear the access logs and move them from QEF's Access Logs database into the repository's Access Logs database.
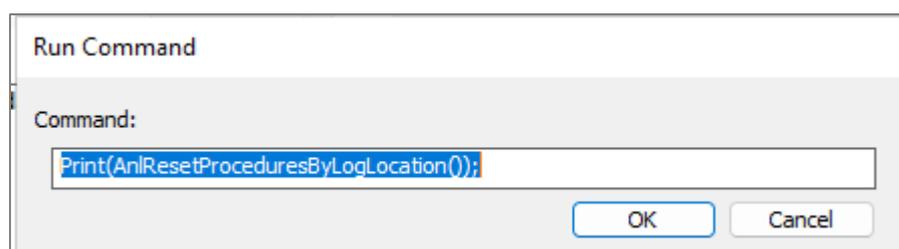
Now run `Print(AnlResetProceduresByLogLocation());`

Figure 12: Update the two procedures

In the message window, 2 procedures are stated to be updated.

6 Upgrade Scripts

As new functionalities are introduced for QEP and GWE, metamodel changes are introduced. After an upgrade, QLM will try to automatically execute the upgrade scripts. It is important to let these scripts execute. For QualiWare 10.8, changes have been introduced to BusinessChart objects and if the upgrade script is not executed, the Business Charts will not be viewable on the web.

7 QEP and GWE

There have been updates to the standard configuration of QEP and some GovernanceWorkFlows. These updates are available in the QualiWare Enterprise Publisher.qrx file and ChangeManagement.qrx file.

Suggestion to merge the updates to an existing repository:

1. Create a backup of the QEP configuration in an existing repository
2. Import the QualiWare Enterprise Publisher.qrx in an empty repository in the same installation as the existing repository
3. Use Repository Compare to compare existing QEP configuration to the standard configuration
4. When using Repository Compare, please make sure you get relevant linked objects related to QEP configuration. E.g., when copying a QueryDesign, also copy the content of that QueryDesign

The approach detailed above is one way to upgrade a customer to the latest version. It might make more sense for some customers to reload the publisher and governance workflows, and it is up to the consultant to come up with an approach that makes the most business sense.