

Guide to QualiWare X upgrade

Patch and version upgrade of QualiWare X

QW

qualiware

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Change log

Date	Change
2021-10-18	Initial release
2021-10-22	Review
2022-05-16	Converted to updated template
2023-03-06	Updated to cover 10.8
2025-09-22	Minor update

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1 Introduction

This document holds a guide to perform a patch upgrade or a version upgrade of QualiWare X installation.

- By a **patch upgrade** means: x.y.z.o =>x.y.z.g or x.y.z.o => x.y.g.h
- By a **version upgrade** means: x.y => x.g

A version upgrade may require more steps than a patch upgrade, all though many of the steps are the same. One additional step may be the licenses, which is covered in **Appendix 7: How to update QualiWare licenses**).

Most of the steps are the same. Details of these are covered in this guide.

When dealing with a version upgrade there might be special issues to take care of. It is recommended to take contact to QualiWare for consulting on this.

This guide covers installations without any customizations. Installations with customizations will work fine.

All configurations and setups done by the QualiWare installation will survive the process documented in this guide.

In case of any doubt please contact QualiWare Consulting.

1.1 Patch Upgrade - Overview

1. Store the update file local at the server and unpack all, for details refer to "**Appendix 1 Unpack the installation file**" NOTE *¹
2. Prepare upgrade with export, access rights, screen shots of QEF/Console and Repository Administrator, for details refer to "**Appendix 2 Backup of the current installation**"
3. Perform the update, through the following steps (for details refer to "**Appendix 3 Perform the update**")
 1. Stop QEF service
 2. Install QEF
 3. Start QEF Service with the right Service Account
 4. Install QIS Bundle from QEF Modules, Install QLM from QEF Modules
 5. Restart the QEF service
4. Start QLM and perform setup of the IIS (Microsoft Internet Information Service), for details refer to "**Appendix 5 Configure the ISS**"

¹ Note *) From 10.5 and onwards the following Microsoft updates are required:

- .NET 4.8
- VC_redist.x64.exe
- VC_redist.x84.exe
- Vcredist_x64.exe
- Vcredist_x64.exe

1.2 Upgrade from one version X to another version X – Overview

This section covers when an upgrade is from one version X to another (e.g. 10.3 to 10.4), i.e. not a patch upgrade).

The following steps must be done, for details refer to **“Appendix 6 Extra step in relation to a regular update”**:

1. Update the license folder
2. Update the data source
3. Update the shared folders

In addition to the above the data must be updated to the new version. Details can be found in **Appendix 4 Upgrade the data with inbuild** .

Appendix 1. Un-pack the installation file

The update file should be stored locally, and all files should be un-zipped.

Below the un-zipped installation file can be seen (note the underlying zip-files should not be un-zipped, only the update zip-file)

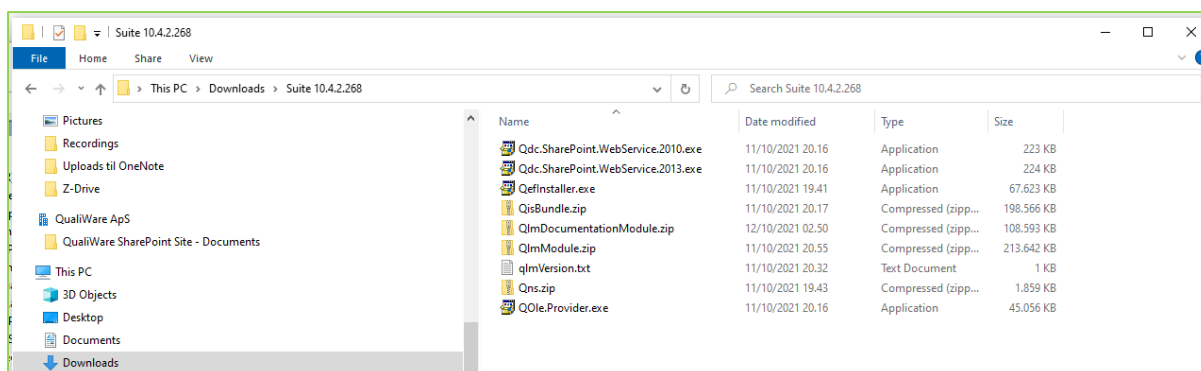


Figure 1: The un-zipped installation package

Note: There are 4 files to install (for details see **Appendix 3**)

- *QEFInstaller* (step 1, see details in section **A3.2**)
- *QisBundle*, *QlmDocumentation*, *QlmModule* (step 2, when QEF is running, see details in section **A3.4**)

Appendix 2. Backup of the current installation

Before the upgrade, the following should be saved/backuped from the current installation:

1. Log on Properties for QEF Service (see details in section **A2.1**)
2. Data/Screen dumps from the QEF console (see details in section **A2.2**)
3. Repository Administrator screendumps (see details in section **A2.3**)
4. Filedump from QLM (see details in section **A2.4**)
5. Copy of Models folder (see details in section **A2.5**)

A2.1. Log on Properties for QEF Service

Save the Log On Properties for the QEF Service for further reference.

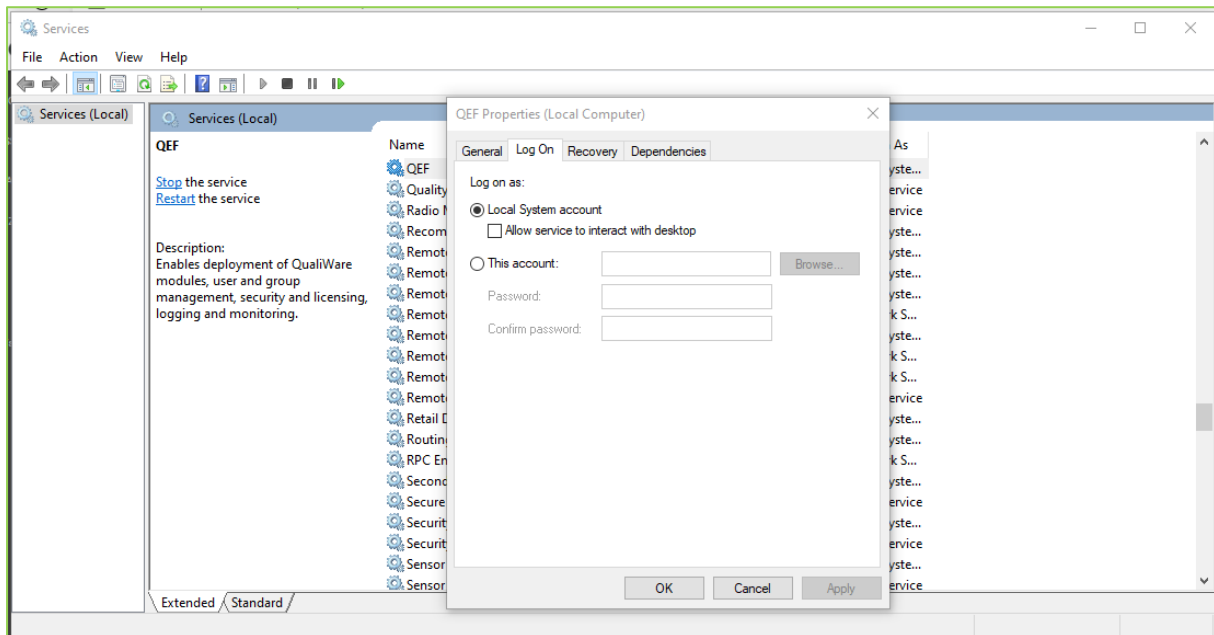


Figure 2: Service account for QEF from services

A2.2. QEF Administration Console

From the QEF console the following properties should be saved for backup:

1. Data Sources -> Connection Strings (see Figure 3)
2. Active Directory Synchronization -> Connection String(s) (see Figure 4)
3. Licenses (overview and details for each license) (see Figure 5 & Figure 6)

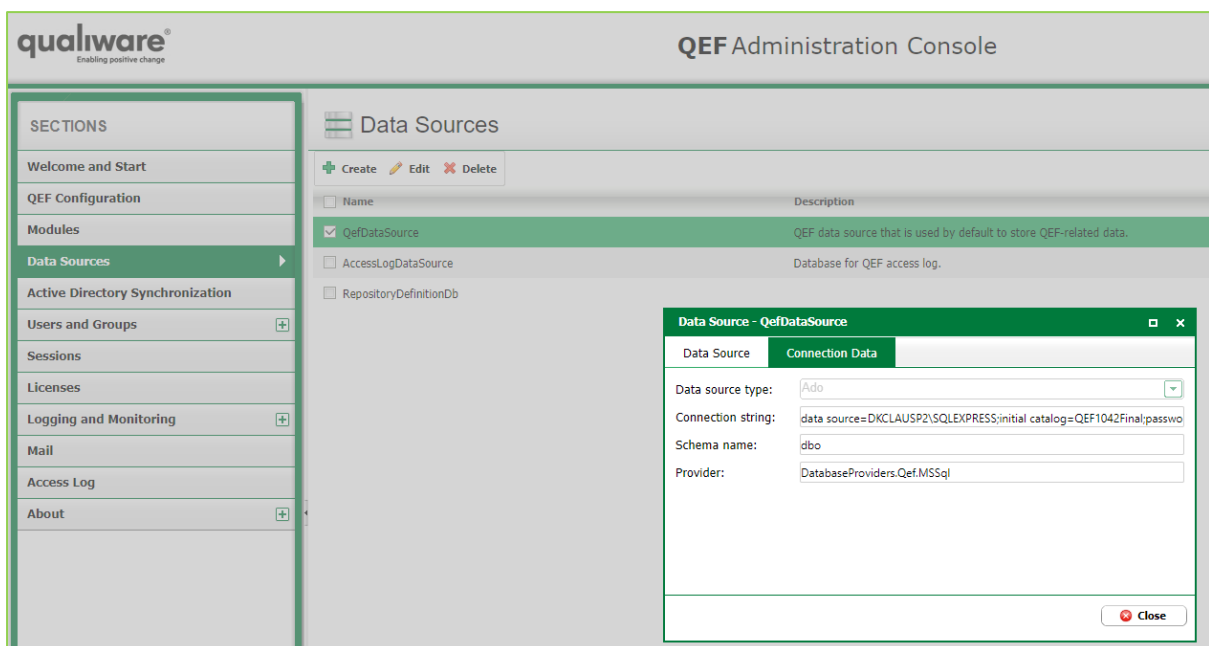


Figure 3: For back up purpose take a copy of the 3 connection strings from the QEF console

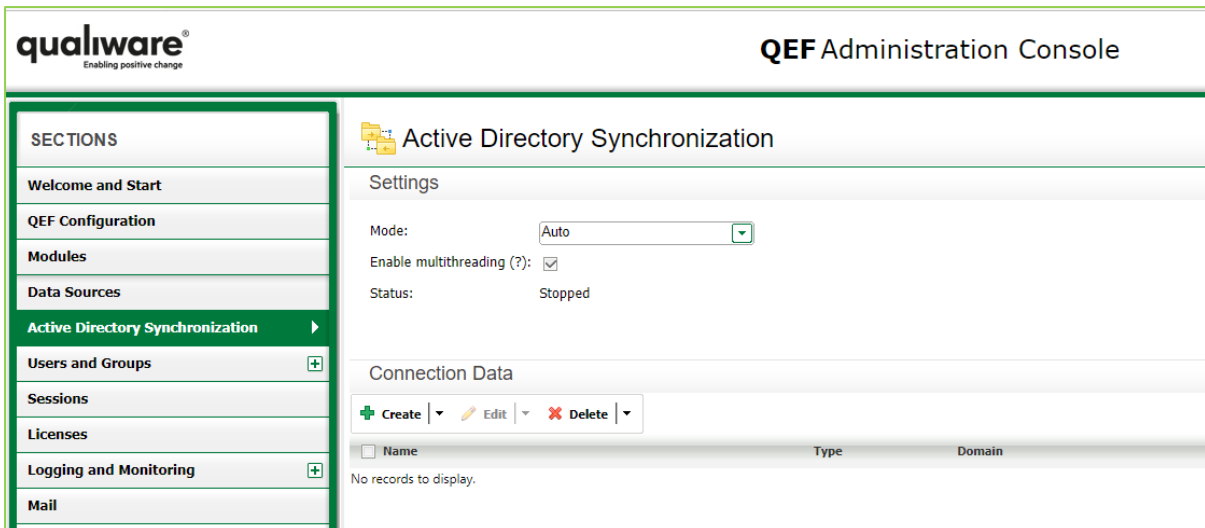


Figure 4: For back up purpose take a copy of the AD connection strings (the are none in this example - not typical)

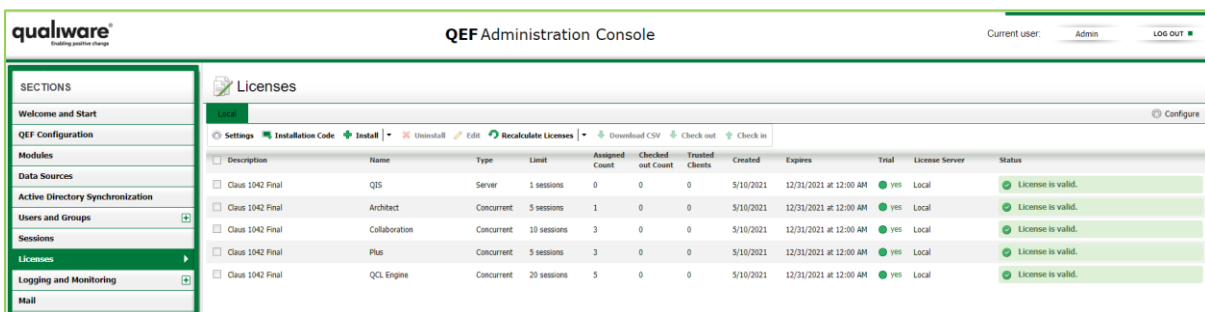


Figure 5: For back up purpose take a copy of all licenses- this view as well as details for each license

For details mark each license one at a time, select edit and save a copy of the details

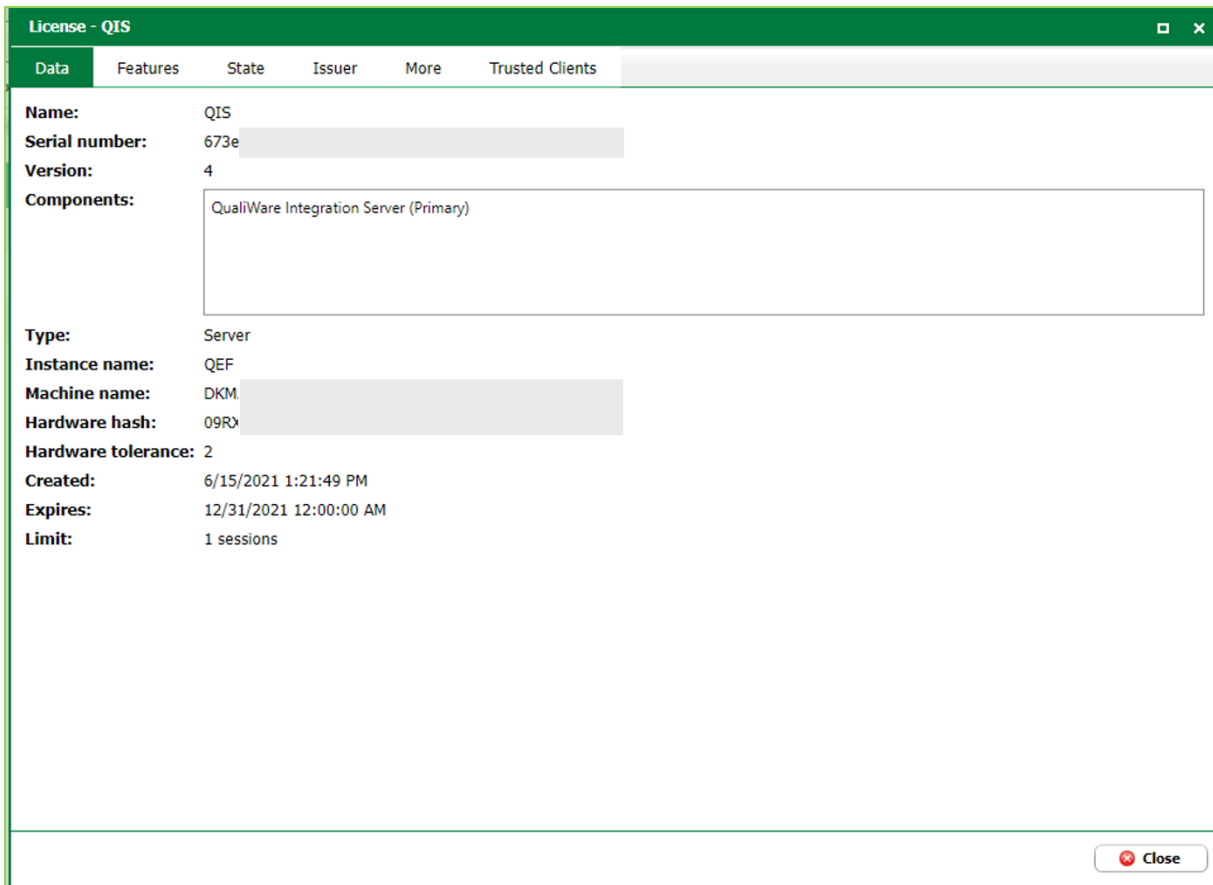


Figure 6: Detail view of a license (take screenshot of all sub-tabs for each license)

A2.3. Repository Administrator

From QEF Console menu Modules, select QIS Repository Administrator.

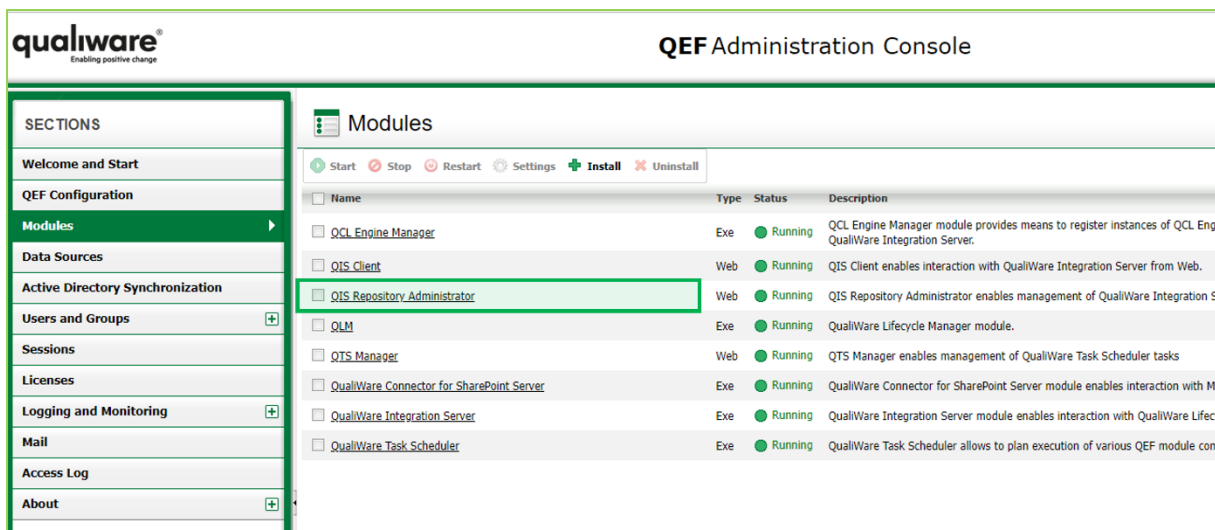


Figure 7: Access to QIS RA via the QEF / Modules

In the QIS Repository Administrator all repositories appear as shown in Figure 8.

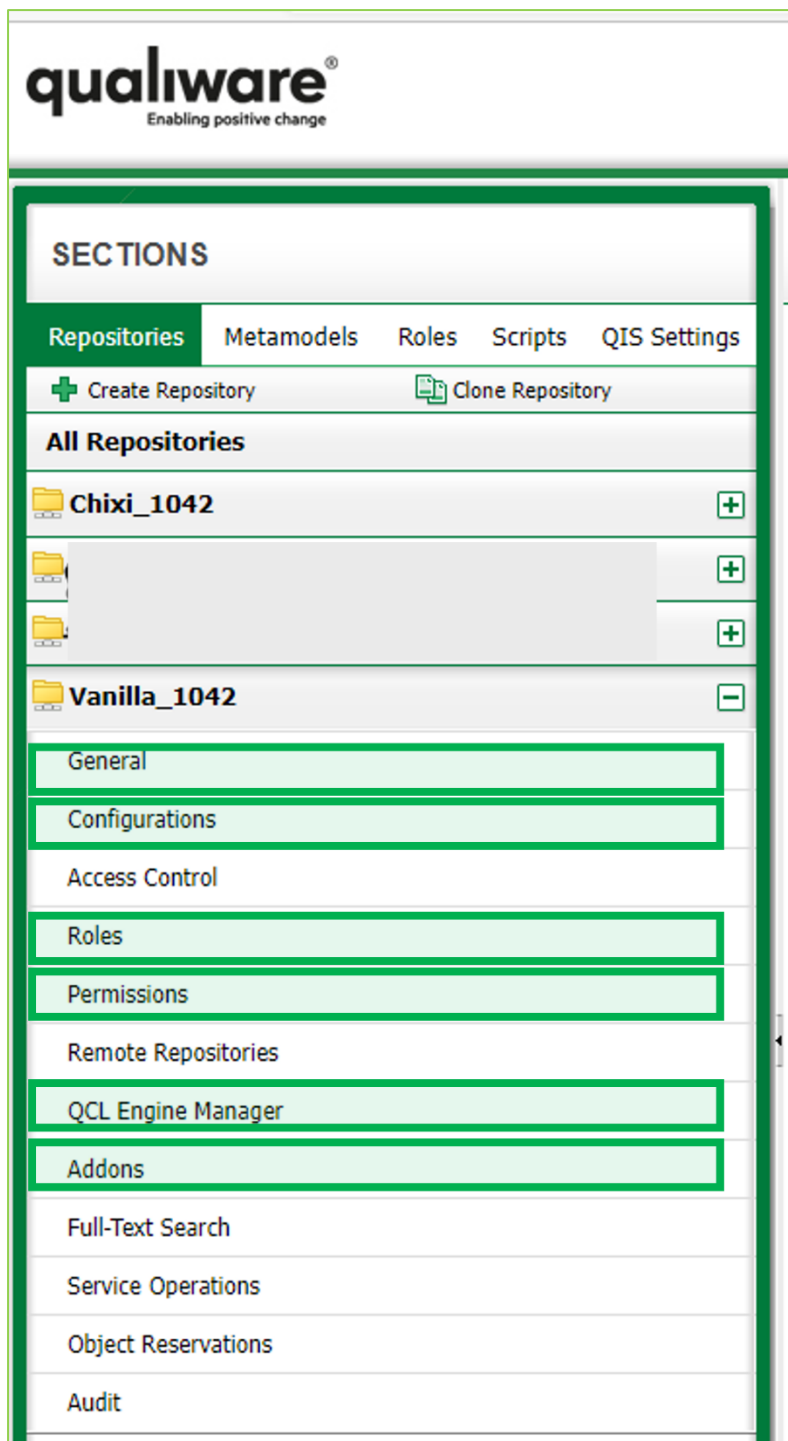


Figure 8: Repository Administrator showing all available repositories

For backup purposes, take a detailed screen shot of the following menus:

- General – all four sub-tabs
- Configurations
- Roles
- Permission
- QCL Engine Manager
- Addons – all 4 sub-tabs

A2.4. Filedump from QLM

Create a dump from QLM for each repository (under menu File => Import and Export => Copy Repository to dump file...).

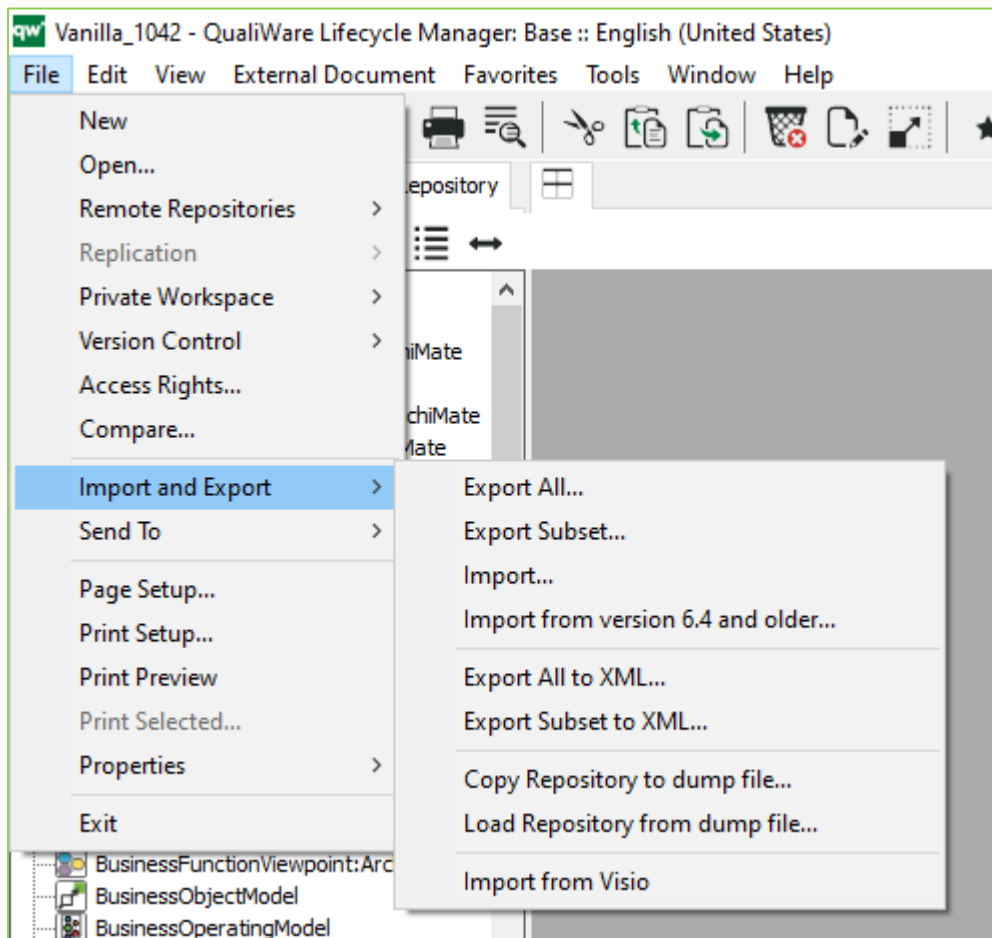


Figure 9: Create repository dump from the File menu

A2.5. Copy of the “Models” folder

Copy the “Models” folder located in “Program Files/QualiWare/QEF/Modules/QLM/[Version Number]/App/”, see example below:

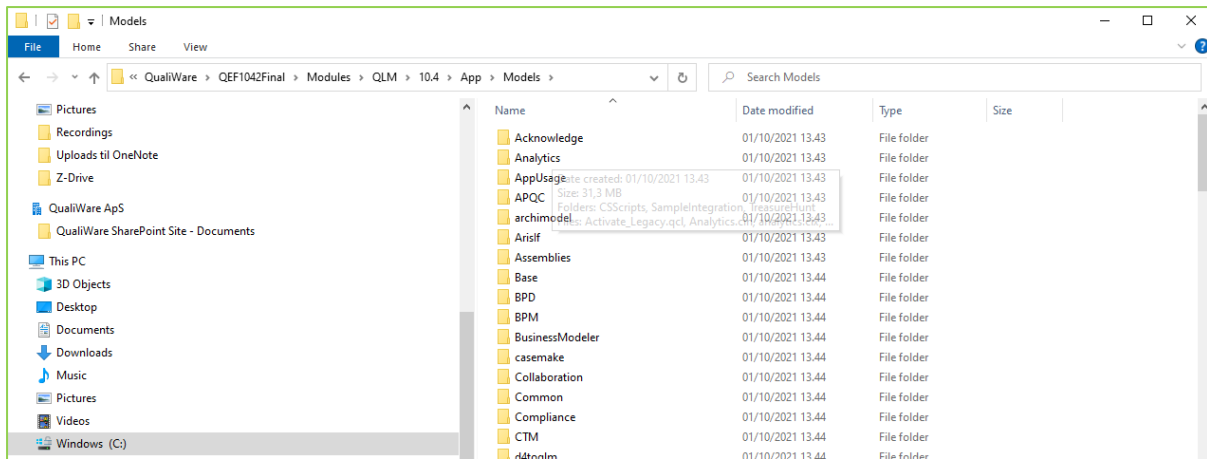


Figure 10: Take a backup of the “Models” folder

Appendix 3. Perform the update

This appendix goes through the various update steps. The main steps are:

1. Stop QEF service,
2. Install QEF,
3. Start QEF Service with the right Service Account
4. Install QIS Bundle from QEF Modules, Install QLM from QEF Modules
5. Restart the QEF service

A3.1. Stop the QEF Service

Close the session with the QEF service running (use the service tool referred to in *Figure 2: Service account for QEF from services*).

A3.2. Install QEF

Run the exe-file:

Name	Status	Date modified	Type	Size
Qdc.SharePoint.WebService.2010.exe	✓	11/10/2021 20.16	Application	223 KB
Qdc.SharePoint.WebService.2013.exe	✓	11/10/2021 20.16	Application	224 KB
QefInstaller.exe	✓	11/10/2021 19.41	Application	67.623 KB
QisBundle.zip	✓	11/10/2021 20.17	Compressed (zipp...	198.566 KB
QlmDocumentationModule.zip	✓	12/10/2021 02.50	Compressed (zipp...	108.593 KB
QlmModule.zip	✓	11/10/2021 20.55	Compressed (zipp...	213.642 KB
qlmVersion.txt	✓	11/10/2021 20.32	Text Document	1 KB
Qns.zip	✓	11/10/2021 19.43	Compressed (zipp...	1.859 KB
QOle.Provider.exe	✓	11/10/2021 20.16	Application	45.056 KB

Figure 11: The QEF installation file (QefInstaller.exe)

Click “OK” on the dialog to start the installation.

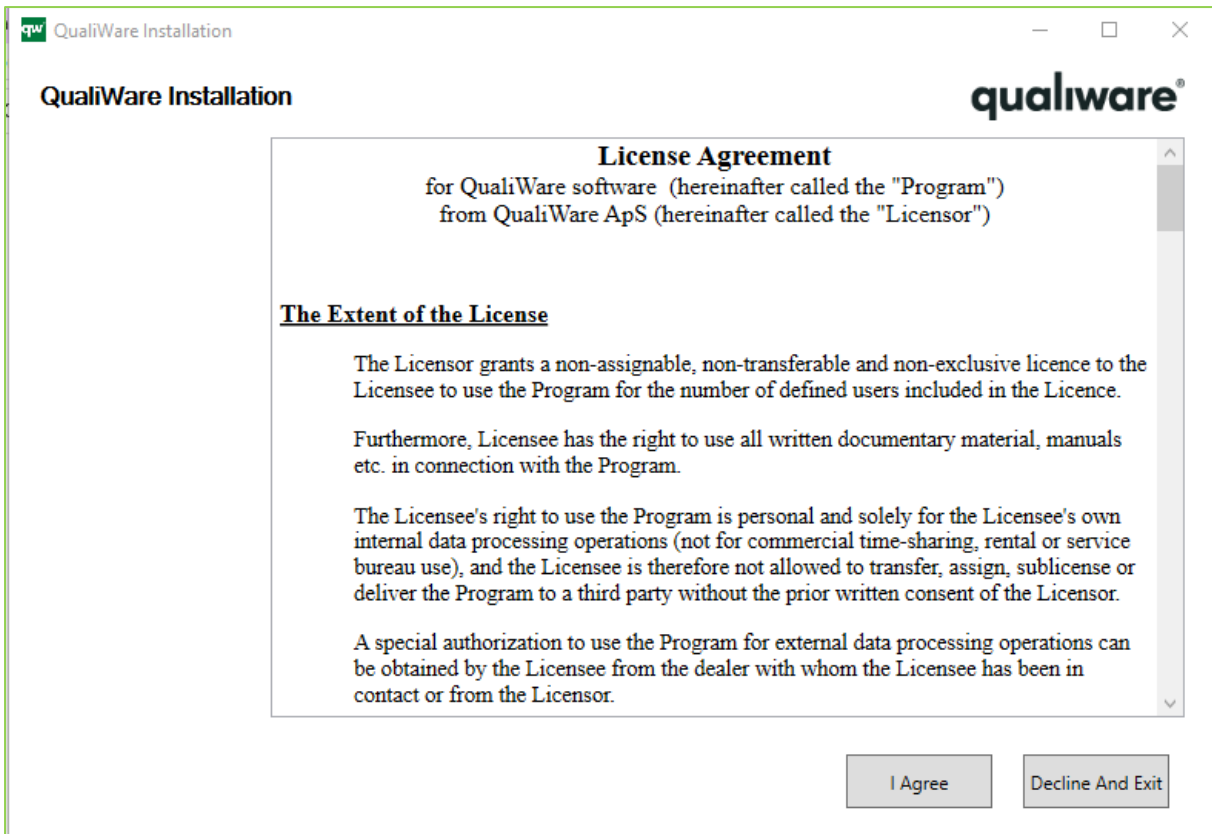


Figure 12: Accept the License Agreement to continue

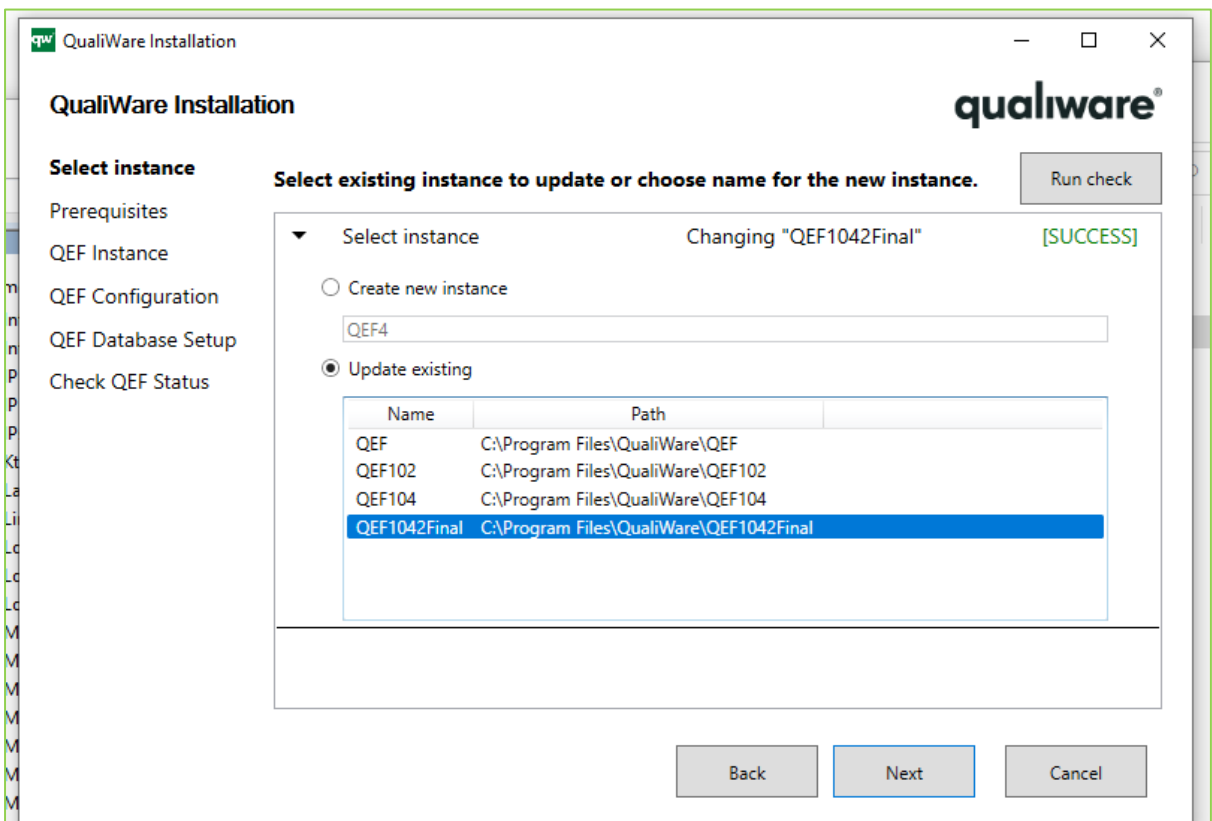


Figure 13: Select the right instance to update

The installation goes through the following steps below:

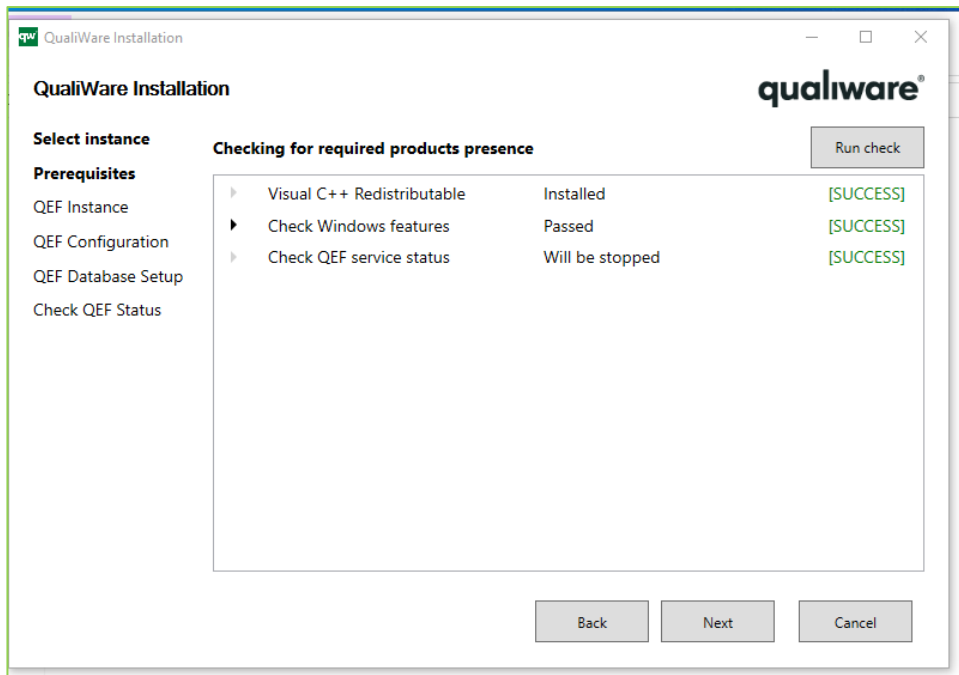


Figure 14: QualiWare Installation / Prerequisites (click "Next" to proceed)

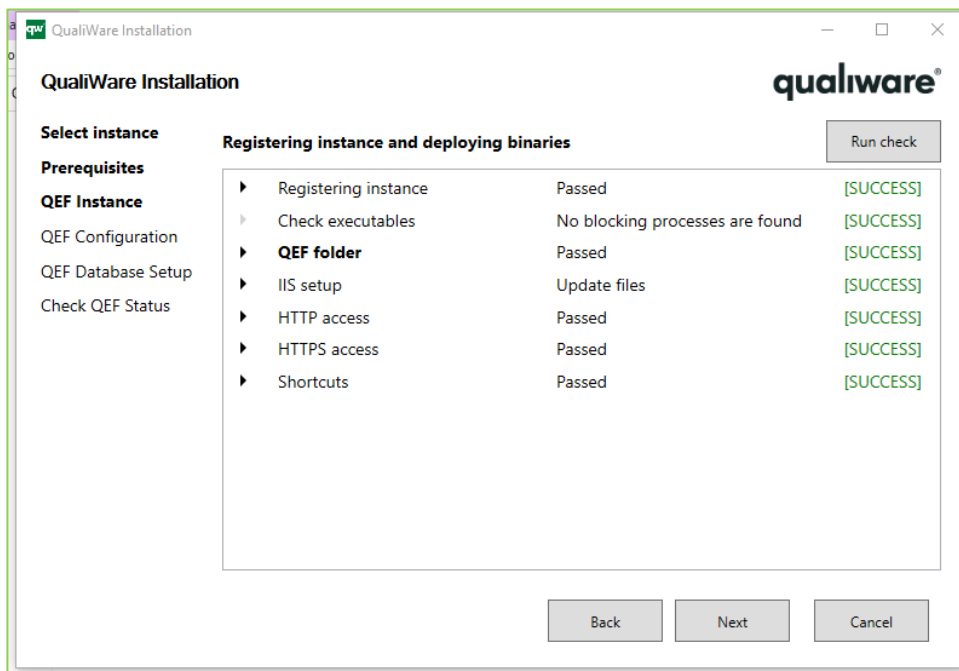


Figure 15: QualiWare Installation / QEF Instance (click "Next" to proceed)

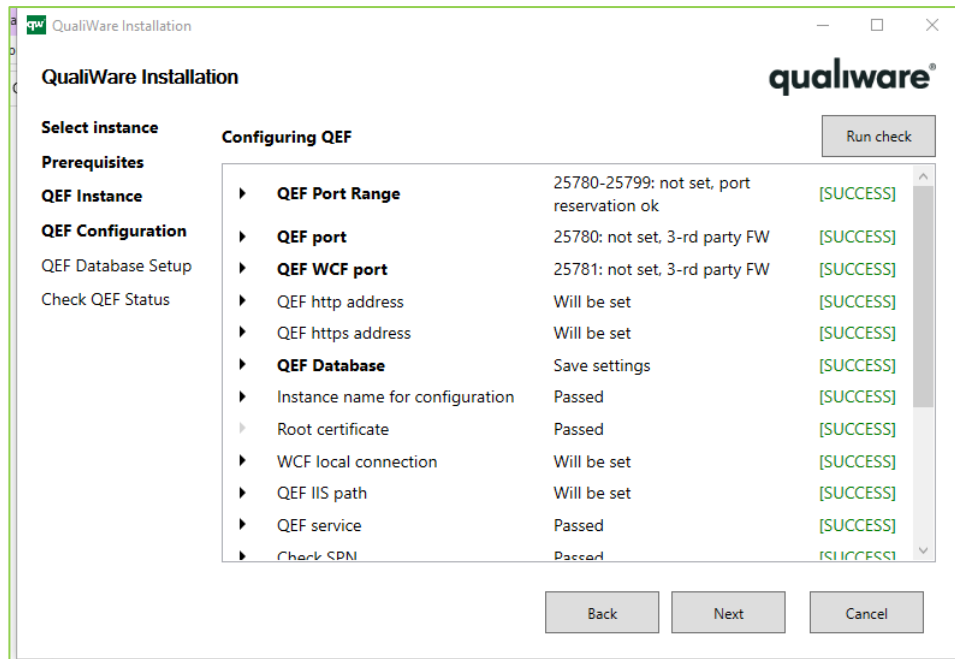


Figure 16: QualiWare Installation / QEF Configuration (click "Next" to proceed)

With the above screenshot, please check that the Database credentials are as expected. Open the "QEF Database".

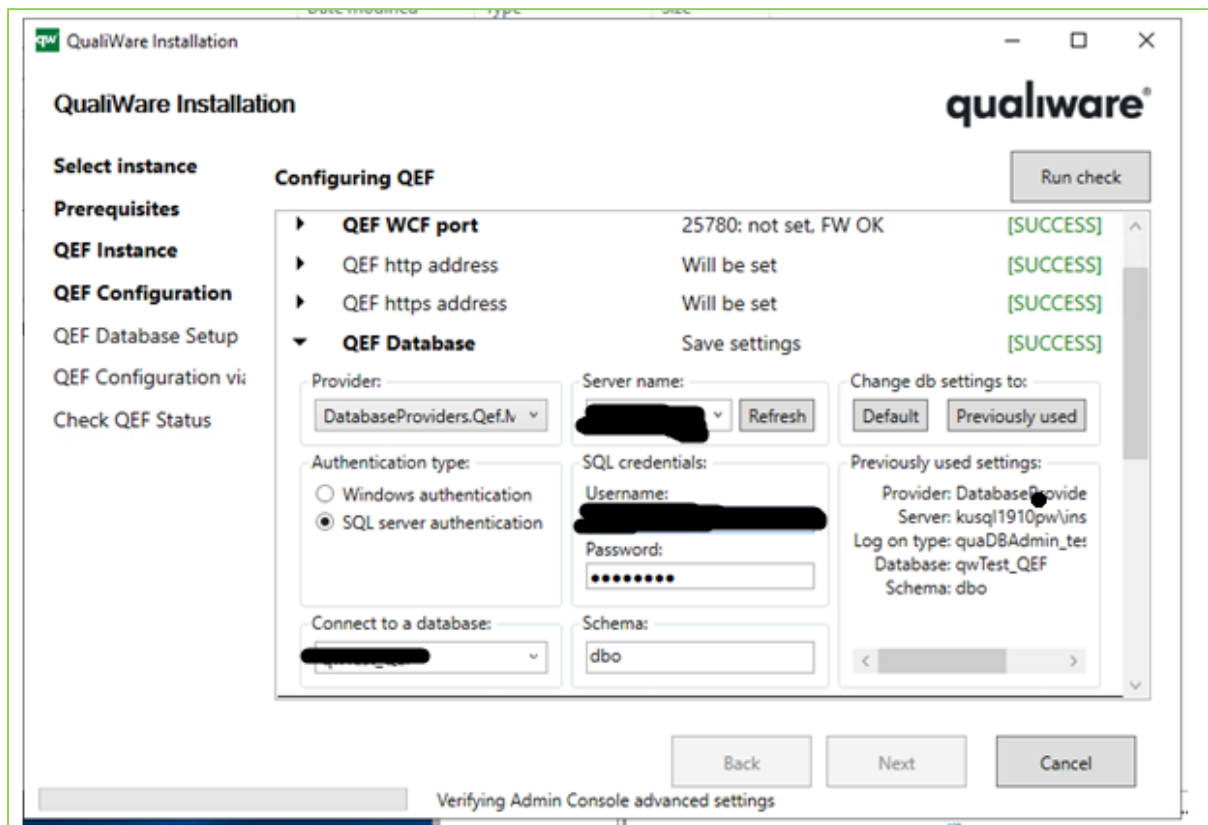


Figure 17: Open the "QEF Database" for details

Select refresh and check access to database (a list of databases will appear).

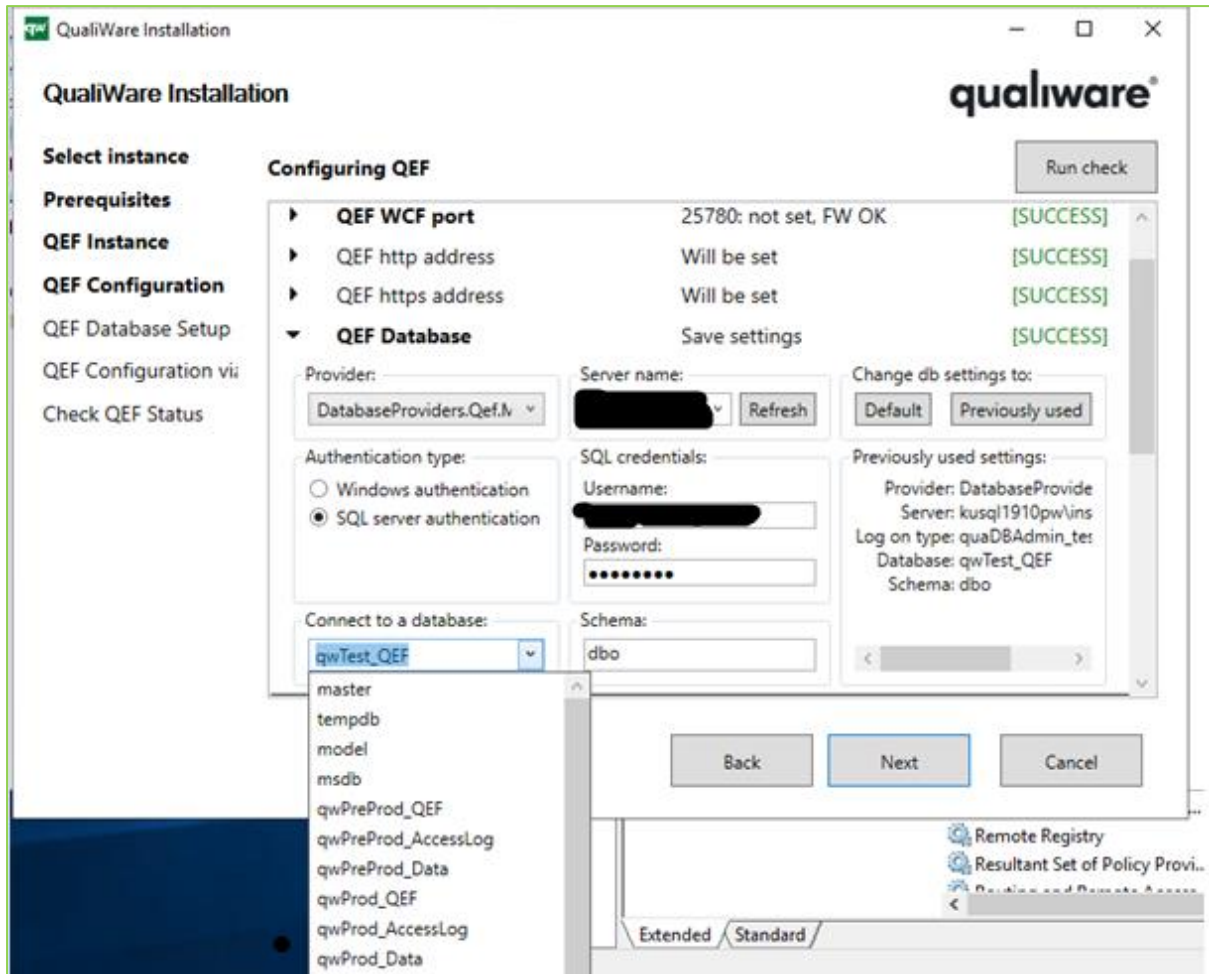


Figure 18: Access to existing databases

After this proceed to next step.

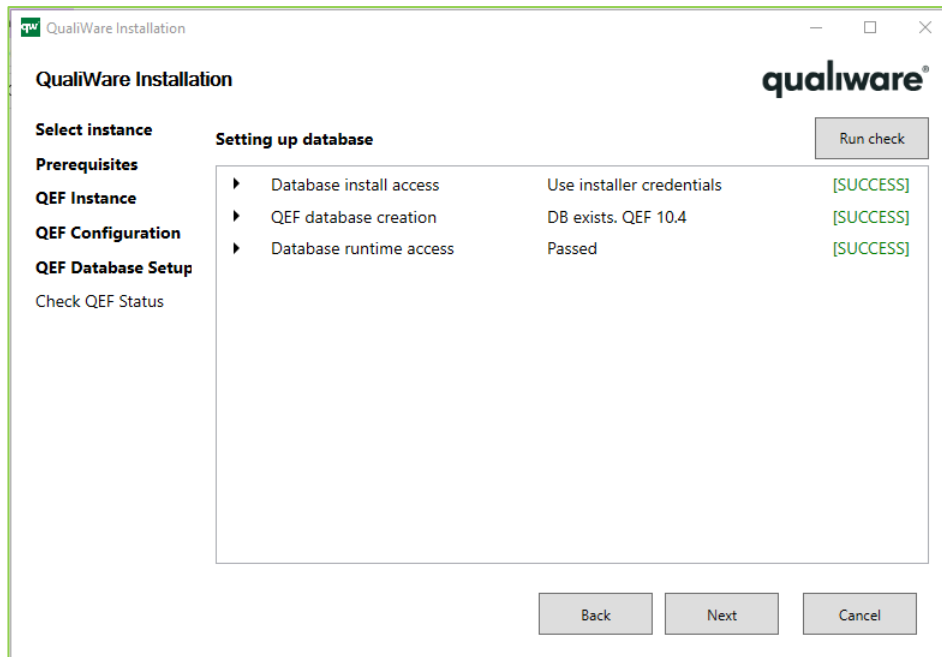
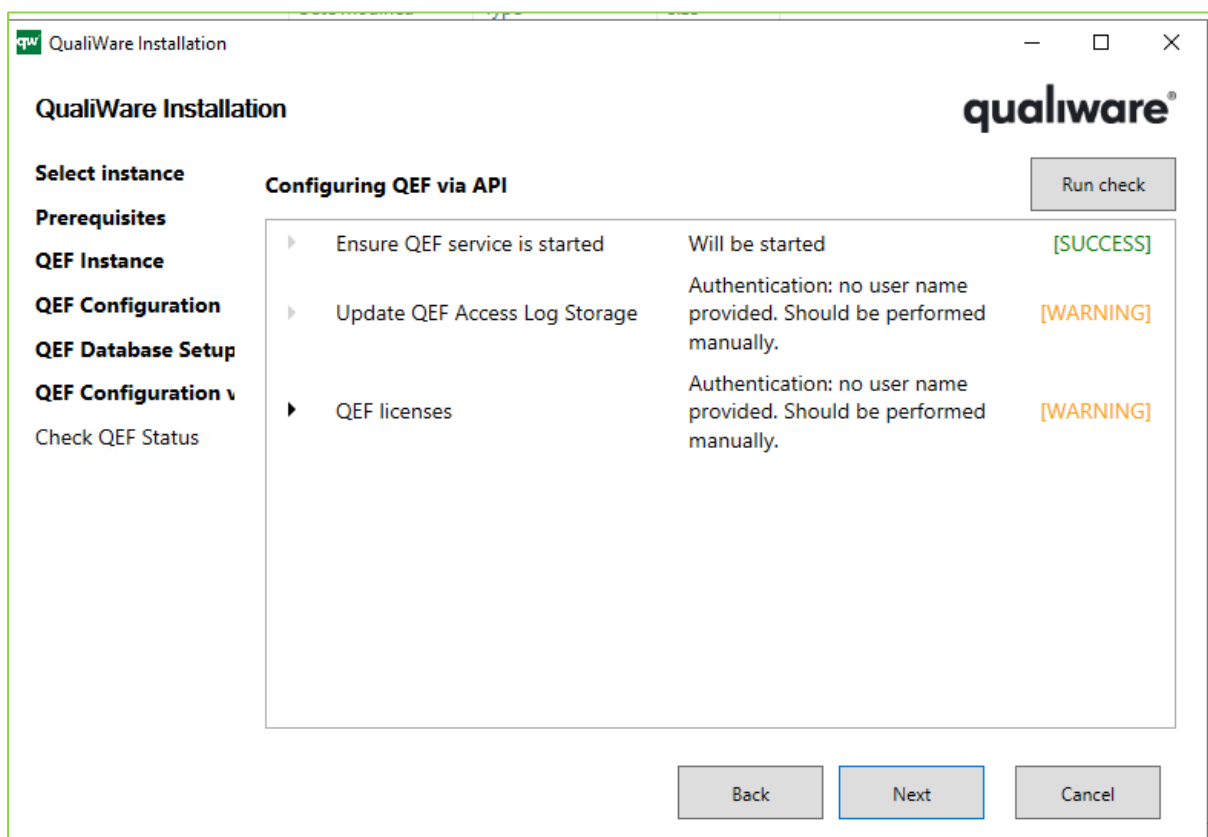


Figure 19: QualiWare Installation / QEF Database Setup (click "Next" to proceed)

Proceed by select Next.



When upgrading to 10.8 there will likely be a warning on the Access Log. The root cause for this is the renewed Access Log concept in 10.8 and beyond.

- In QualiWare 10.5 and older, a single Access Logs data-source was created 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.

Details on this can be found in the upgrade guide for 10.8. The document can be found under COE [Upgrade to 10.8 \(qualiware.com\)](https://qualiware.com), section 5.

Regarding the licenses this is likely because the license settings points to an old folder (e.g. 10.5) and not the current version (e.g. 10.8). Setting may be changed when QEF is running again.

Please select “Next”.

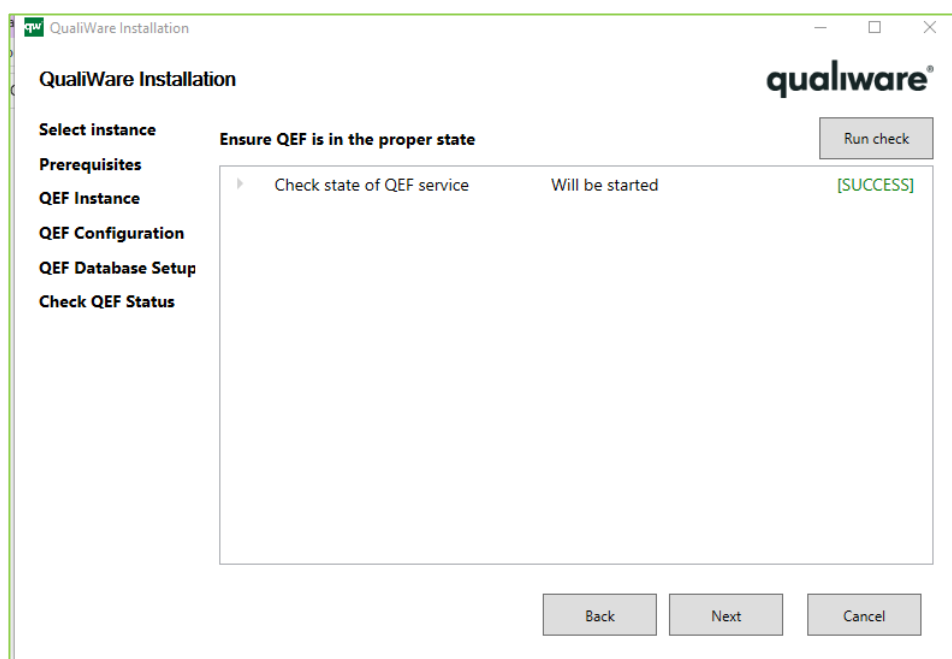


Figure 20: QualiWare Installation / Check QEF Status (click "Next" to proceed)

After all steps have passed take a copy of the result and save for further reference.

Start Window service and start QEF.

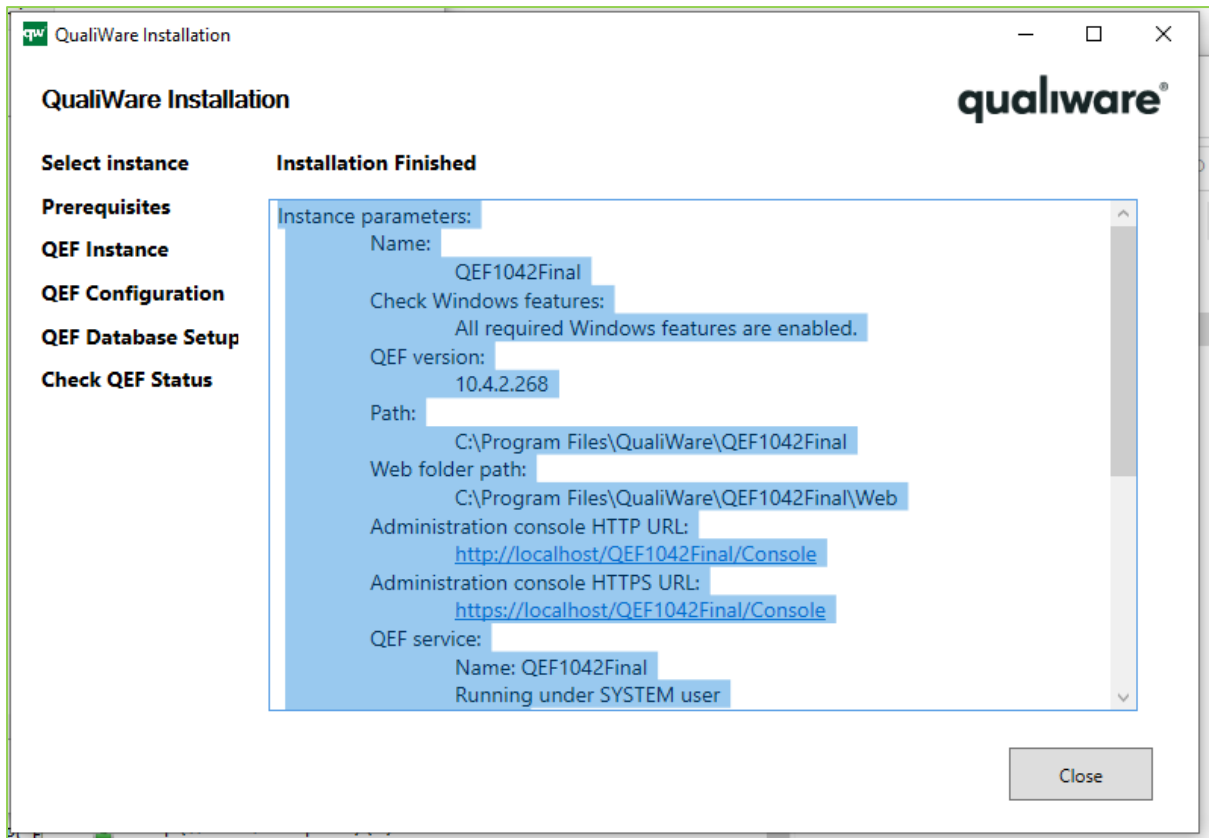


Figure 21: Result of the QEF installation

A3.3. Start QEF Service with the right Service Account

Typical the local account is used for update of QEF, if so then QEF service must be started with the right service account after the installation of QEF. User the Microsoft service

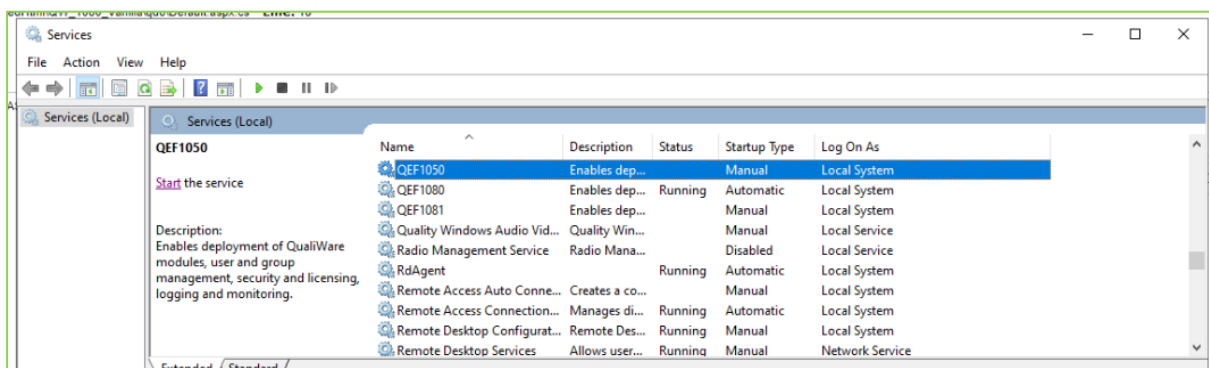


Figure 22: Identify the right QEF service

Reload the QEF/Console start page:

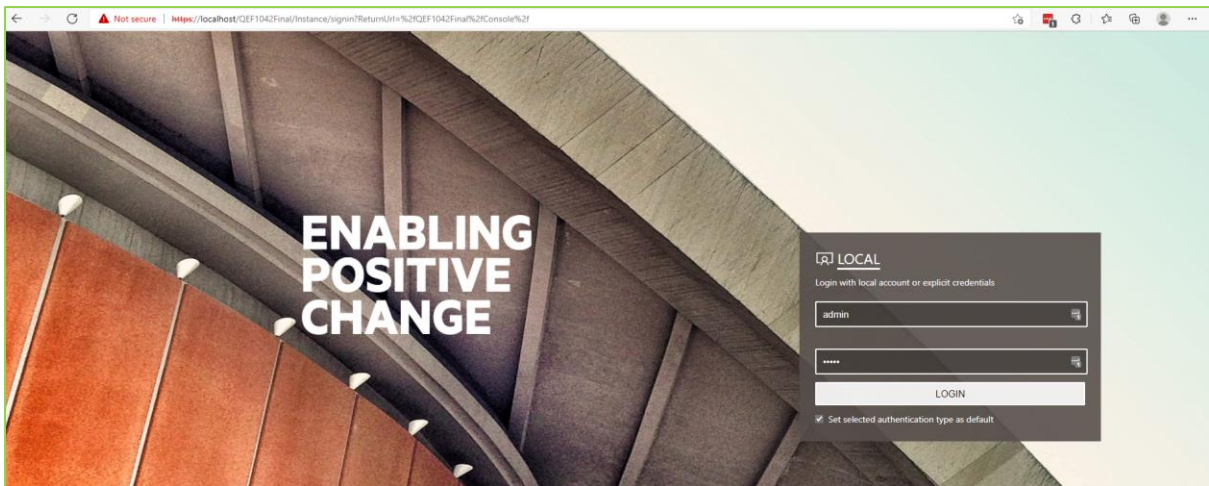


Figure 23: QEF/Console start page

For 10.4 and earlier the login screen includes Windows and Local login. For 10.5 and beyond this has been extended.

Note: When AD Synchronization is configured the WINDOWS login option will appear.

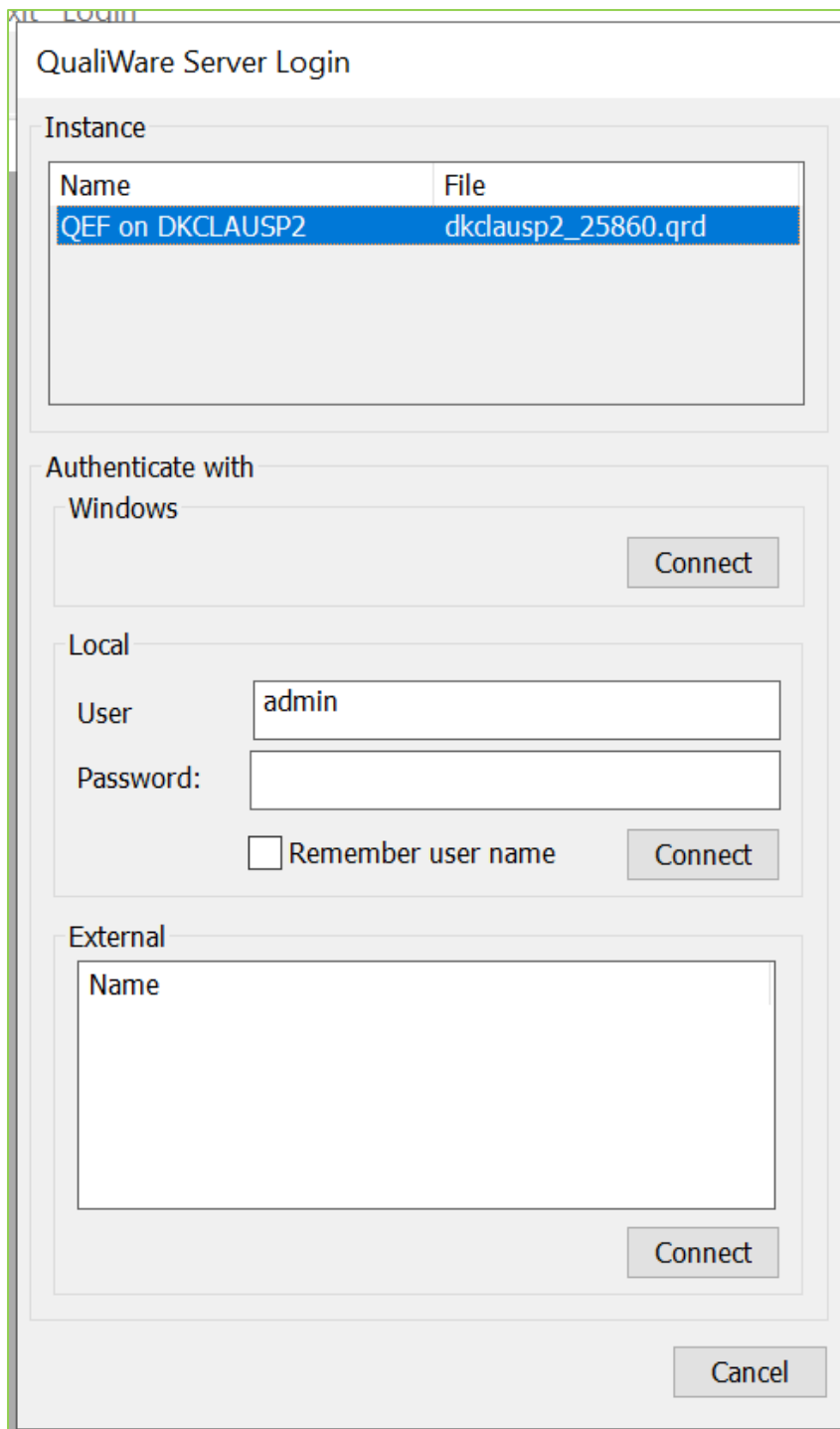


Figure 24: Login options in 10.5 and later releases

The above is from QLM, a similar option is from WEB. The External option covers installations in Azure.

Check the version after the upgrade.

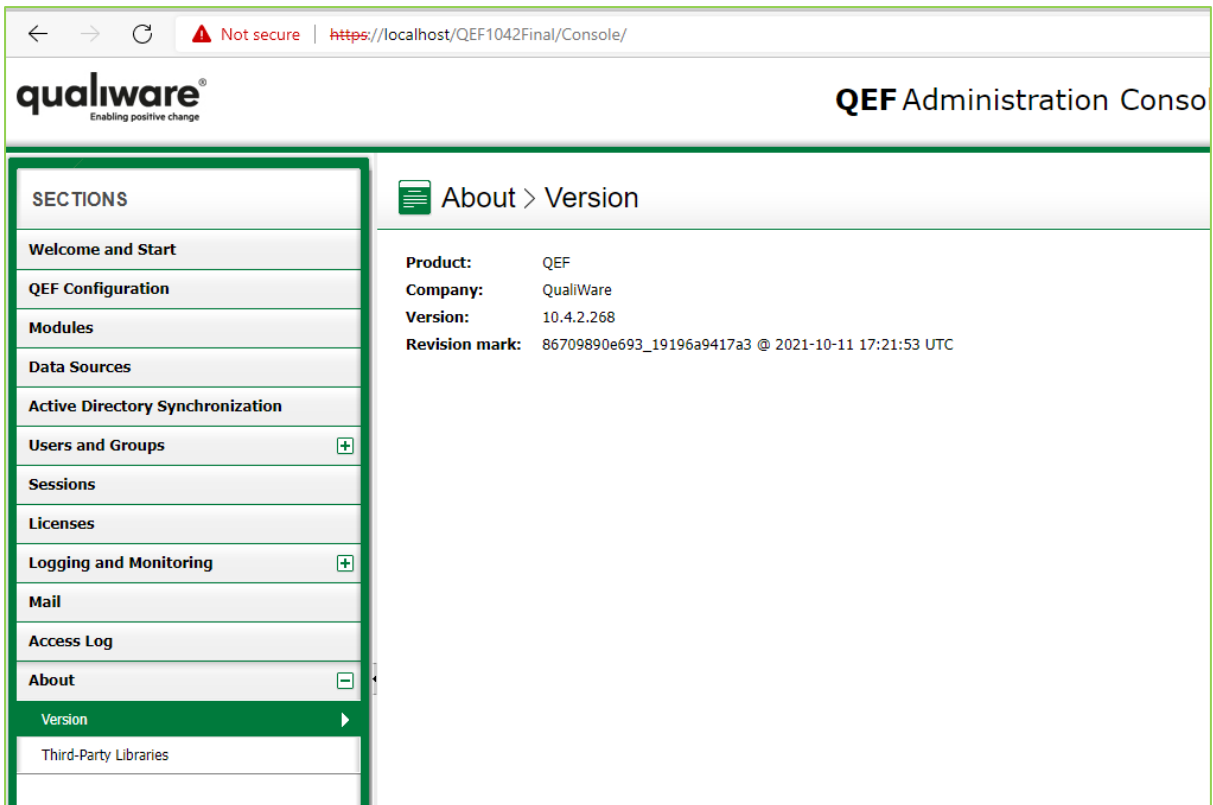


Figure 25: Check the version

A3.4. Install QIS Bundle from QEF Modules, Install QLM from QEF Modules

After upgrading the QEF, the installation packages should be installed.

There are 3 installation packages to install, one at a time (repeat the following step for each package).

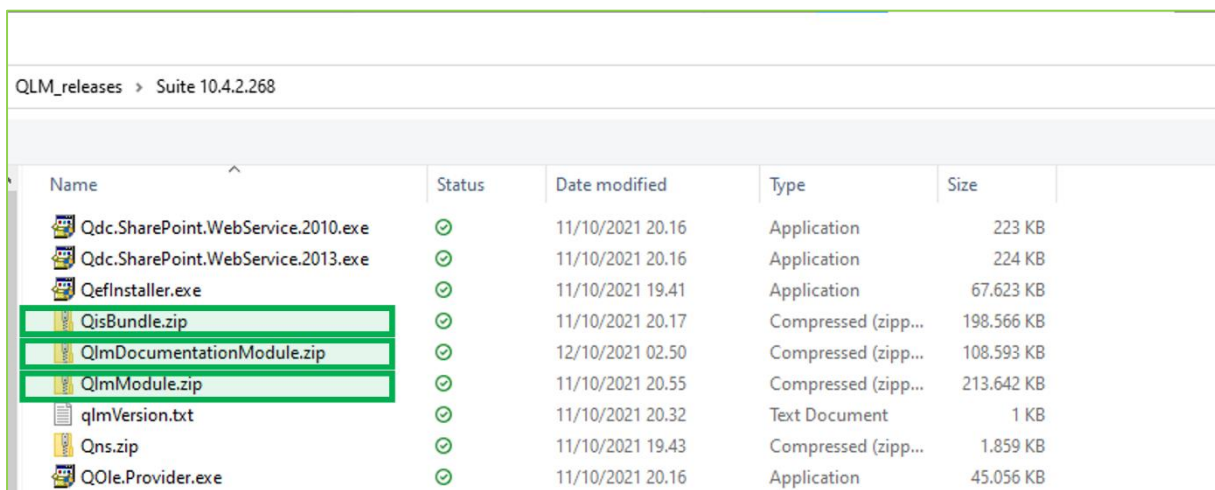


Figure 26: 3 packages should be installed (1 at a time)

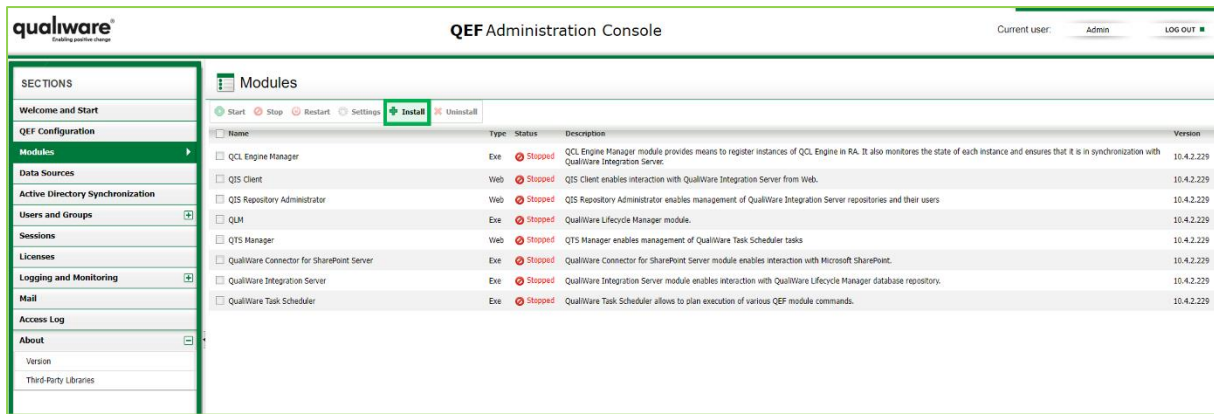


Figure 27: Under modules - select Install

WARNING: Default folder is the last installed QW Version ... make sure to find the right folder.

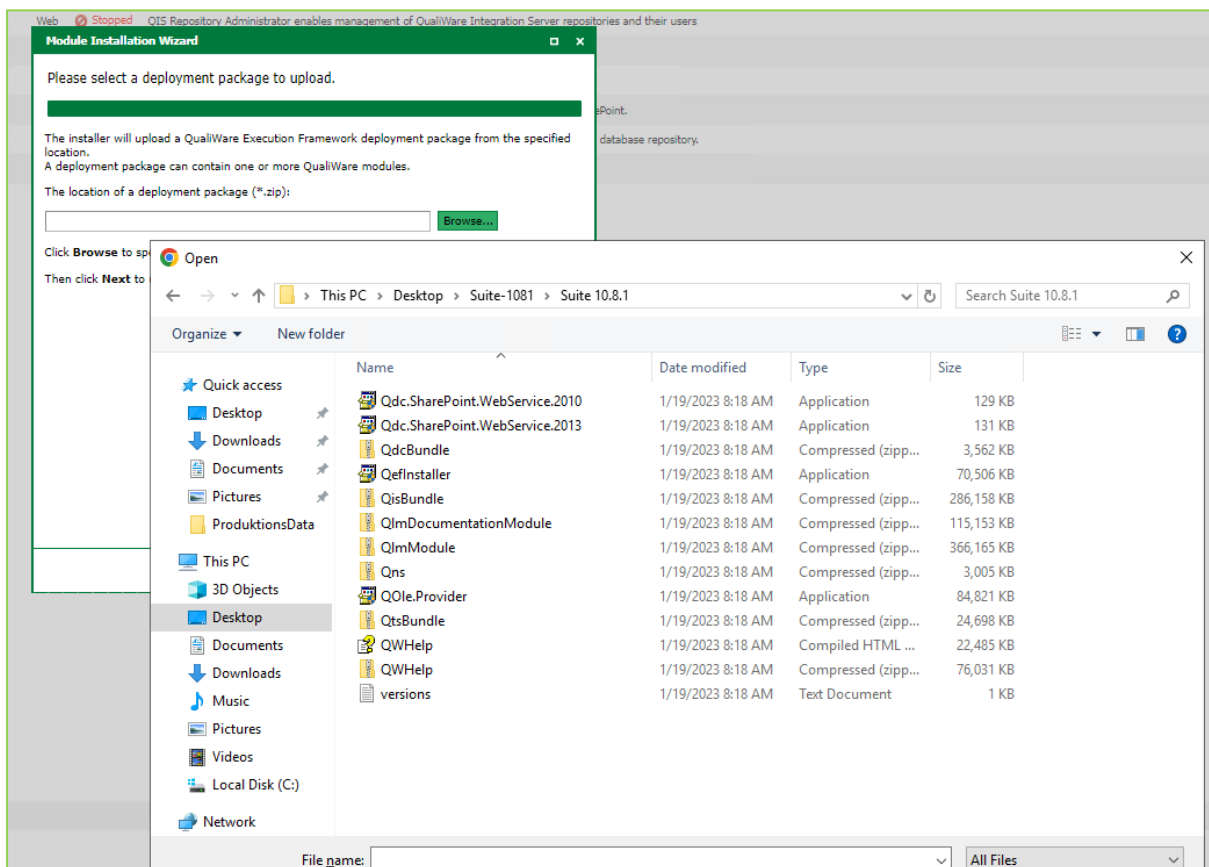


Figure 28: The install folder from 10.8 and onwards

Note that there are more installation packages than in 10.5. The reason is the size of the files.

1. QImDocumentationModule
2. QImModule
3. QisBundle
4. QtsBundle
5. QdcBundle

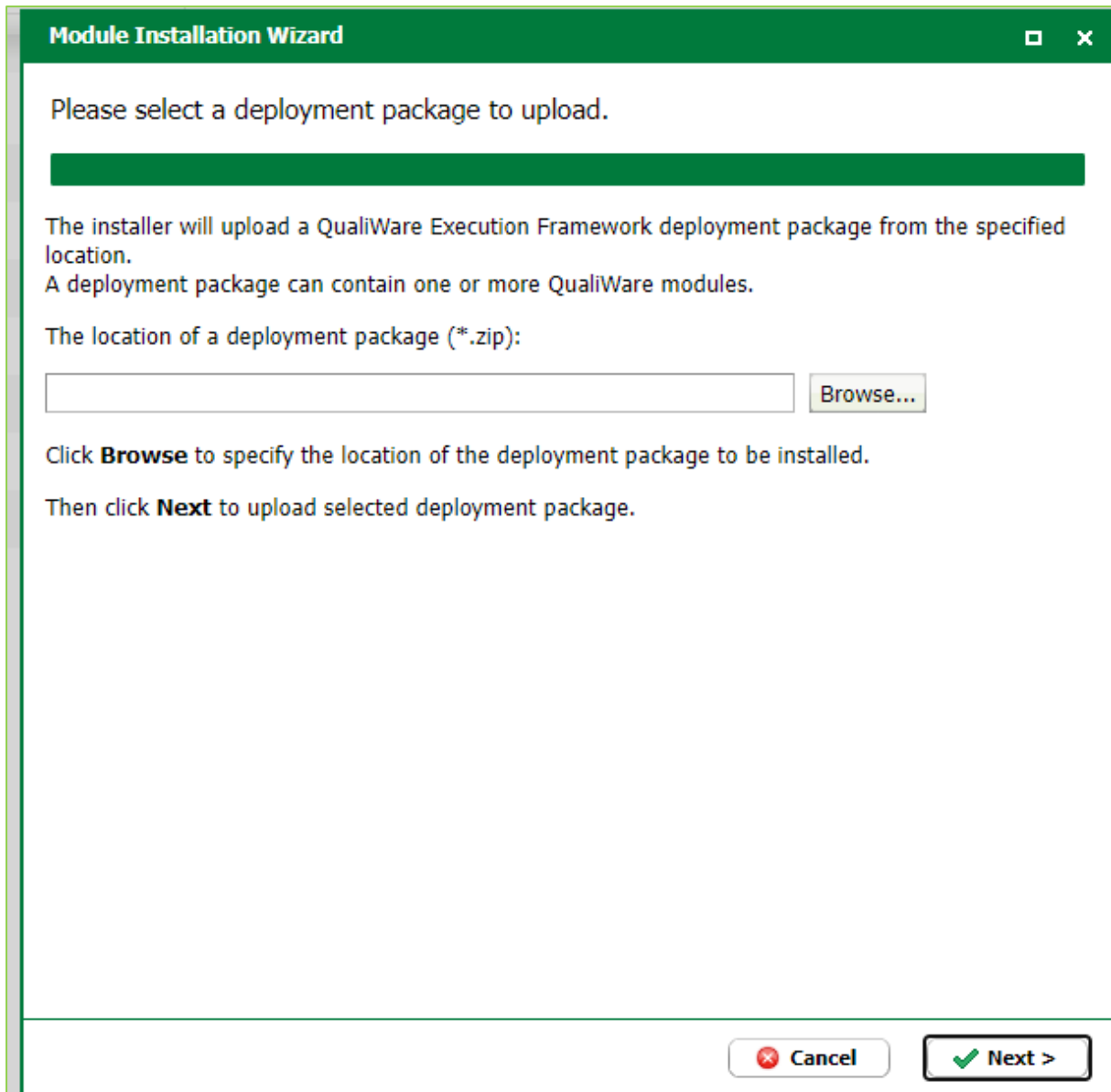


Figure 29: Module Installation Wizard (Browse to the folder with the un-packed installation files, cf. Appendix 1)

Note: Make sure to use the right folder ... the installation remembers the original

For each of the 5 installation packages the installation goes through the following steps:

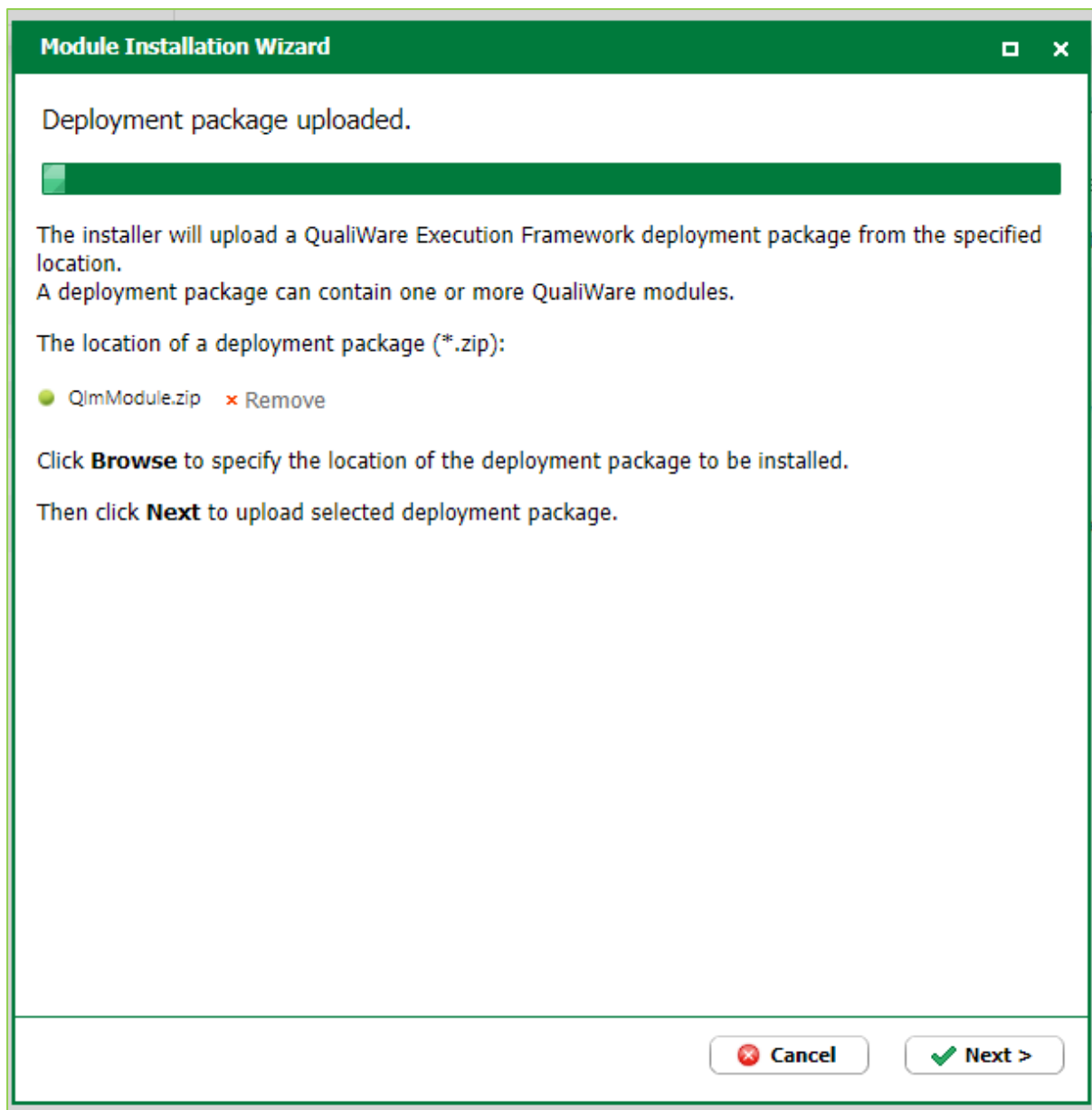


Figure 30: Module Installation Wizard / Deployment package uploaded (click "Next" to proceed)

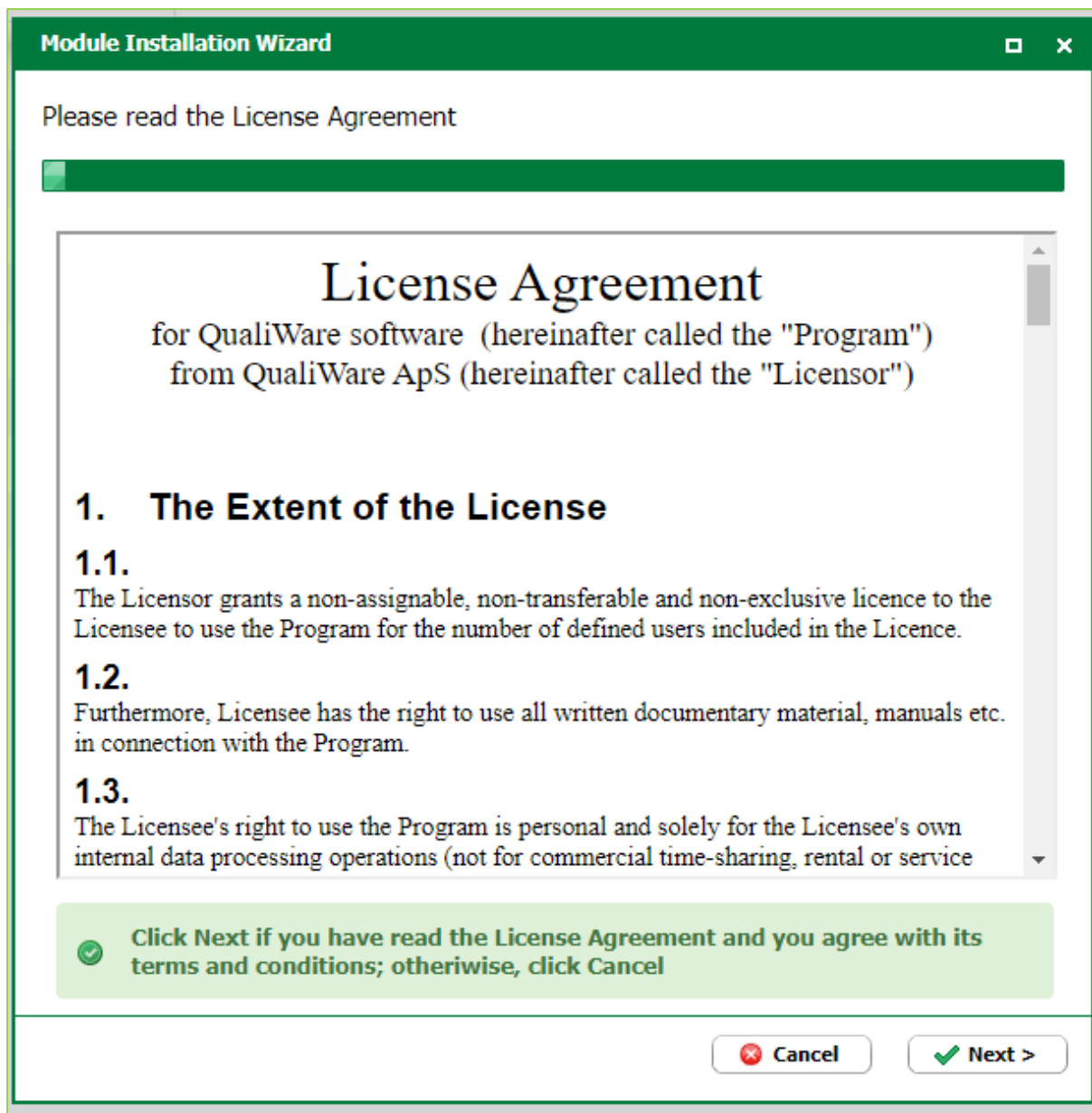


Figure 31: Module Installation Wizard / License Agreement (click "Next" to proceed)

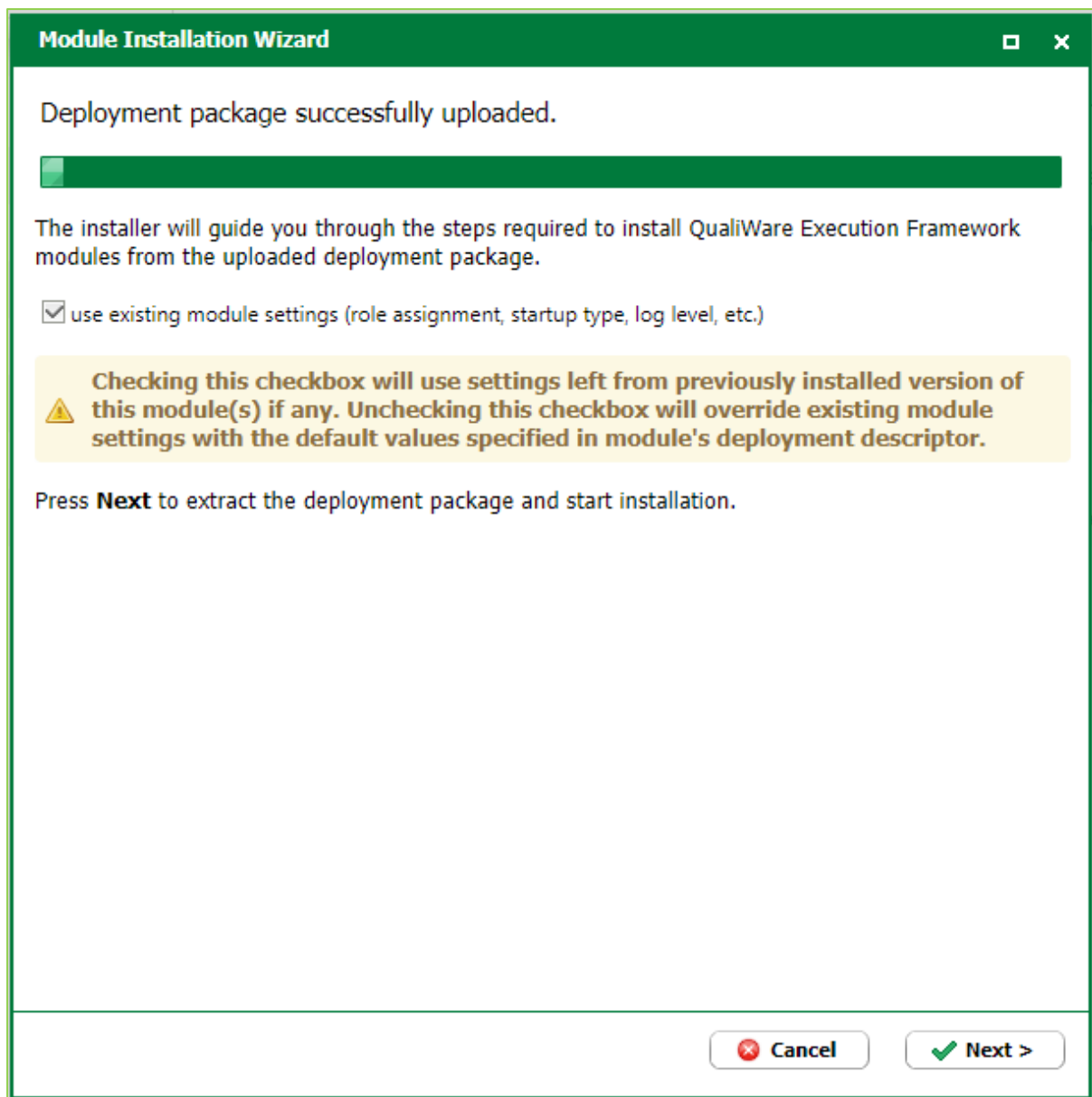


Figure 32: Make sure the "use existing modules are set" (and click "Next" to proceed)

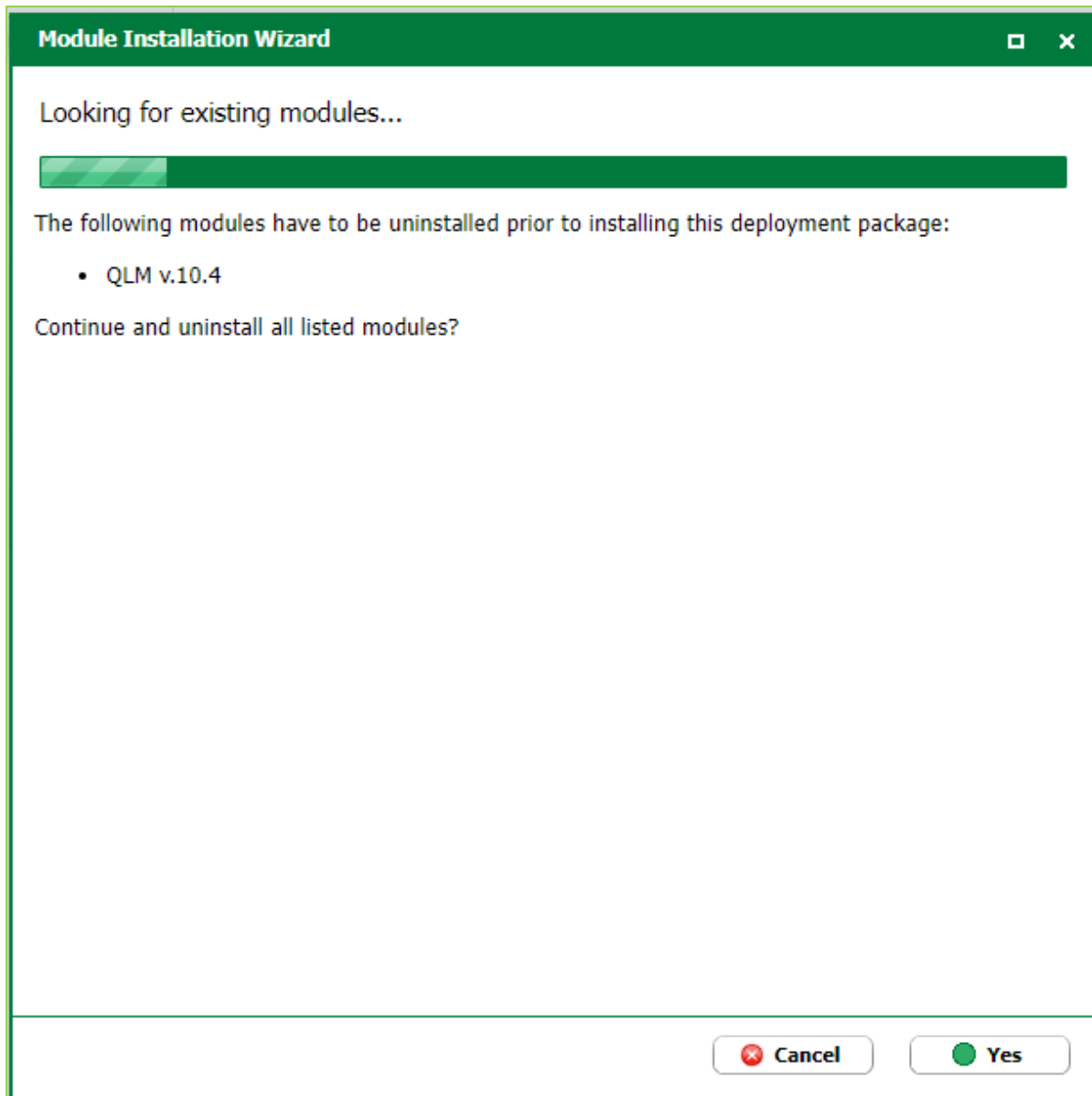


Figure 33: Click "Yes" to proceed (Note same UI as in 10.5)

Note: Starting "QLMModule" and "QLMDocumentationModule" requires the modules from QisBundle to be running. If installations of the two modules happen prior to QisBundle then the below warning will be shown.

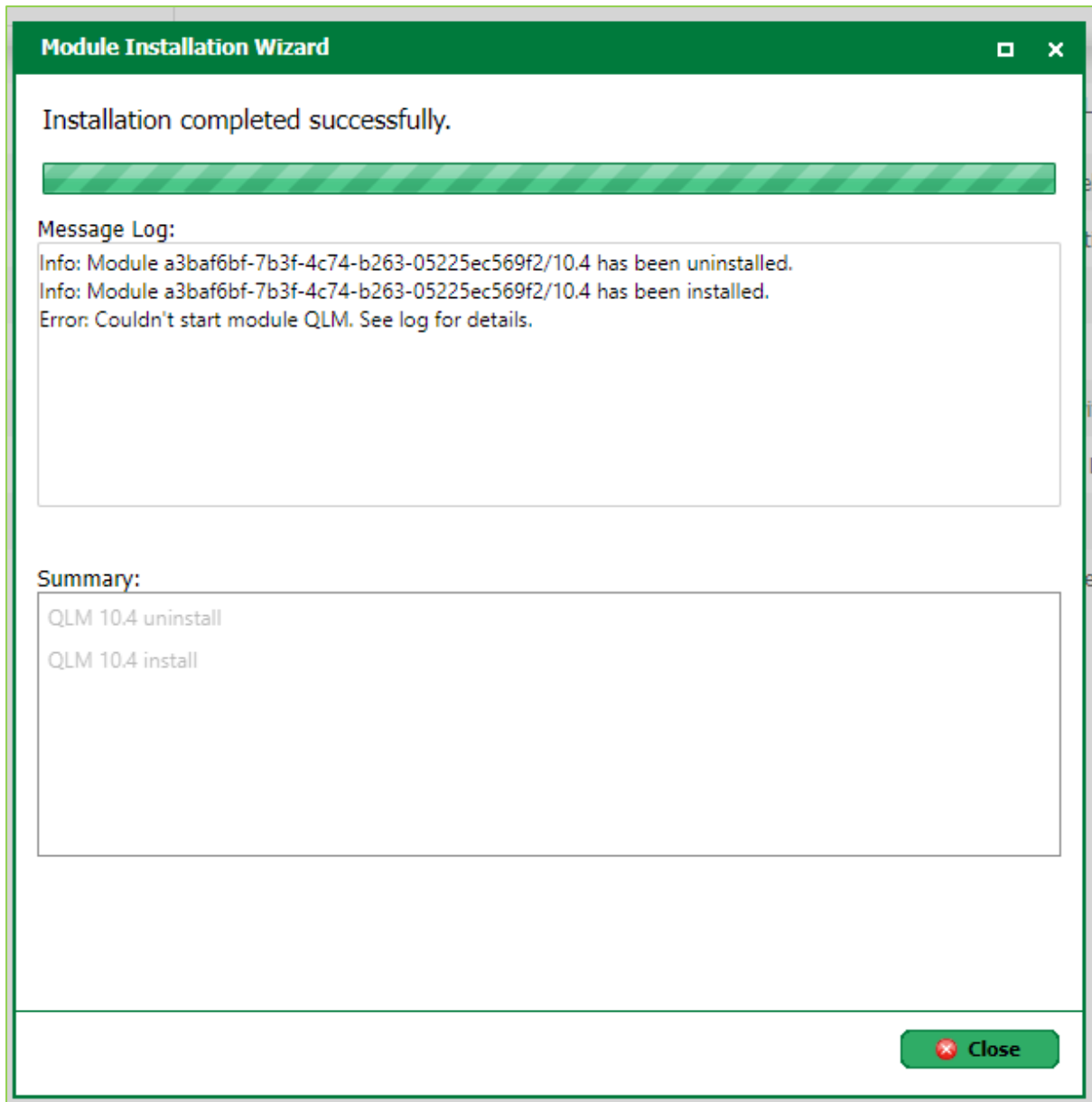


Figure 34: Installation Successful, click "Close" to proceed. (A warning is shown if the module couldn't start, cf. note)

Repeat the above steps for all installation packages.

Confirm that all modules have the right version and are running.

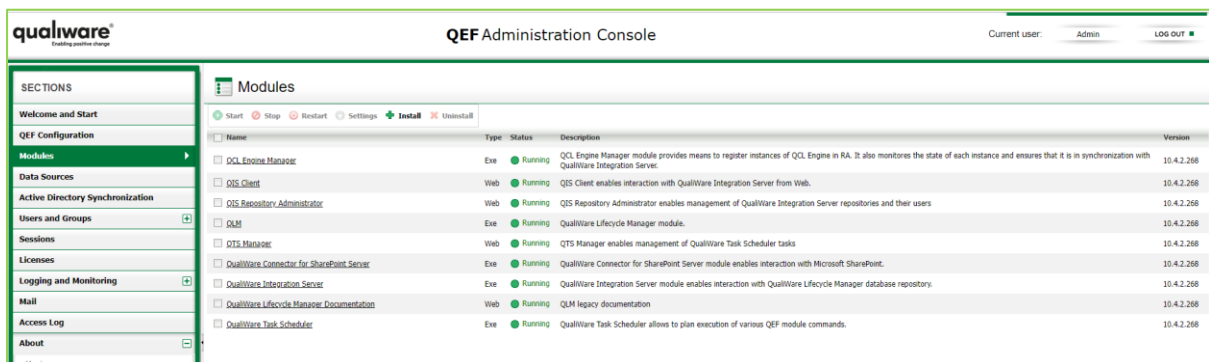


Figure 35: Confirm that all modules have the right version and is running.

Check that all repositories have green radio buttons.

A3.5. Restart the QEF service

As a last check restart the QEF service. This is a double check that the installation can be restarted.

Appendix 4. Upgrade the data with inbuild scripts.

When performing an upgrade from one version to another e.g. 10.4 to 10.5 update scripts need to be runned as well. This happens the first time the QLM is started after the modules have been updated.

1. The QLM will automatically ask if upgrade scripts should be run ... to this the answer is YES
2. Next the QLM will ask if unused objects should be deleted – to this the answer is YES

Appendix 5. Configure the ISS

After the upgrade, the Microsoft Internet Information Service needs to be reconfigured.

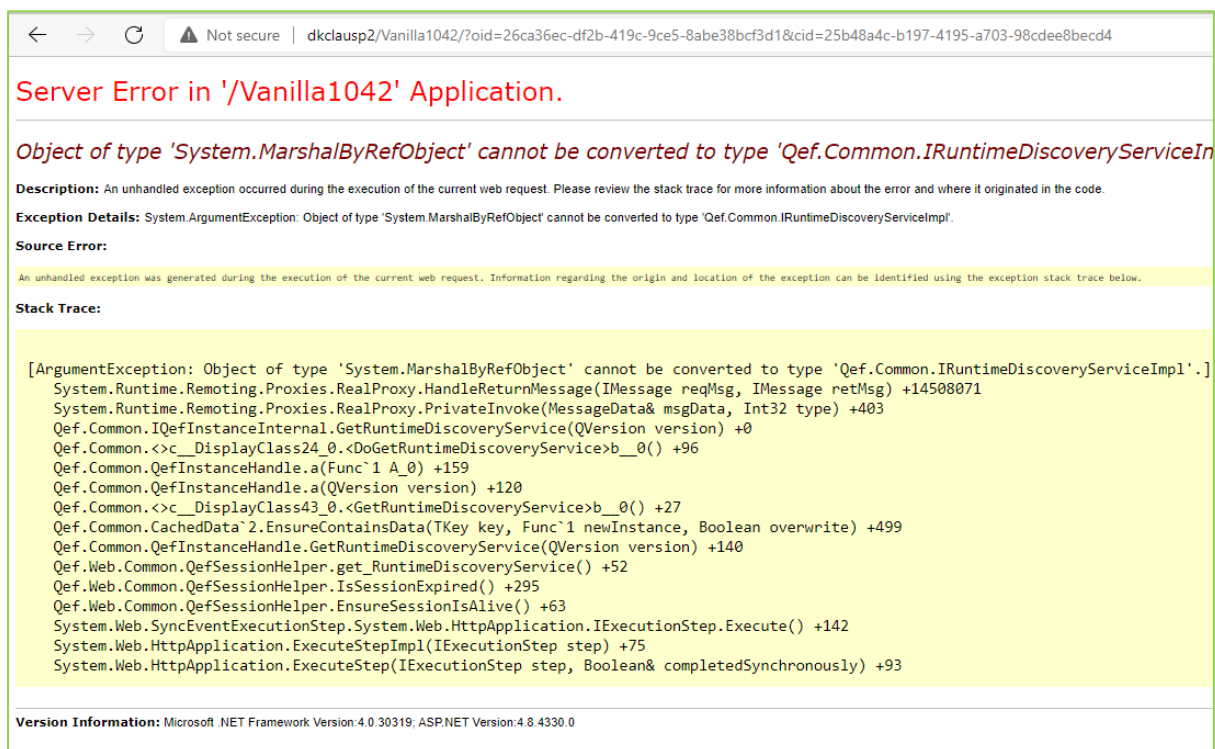


Figure 36: When IIS has not been set.

Start QLM and perform setup of the IIS (Microsoft Internet Information Service)

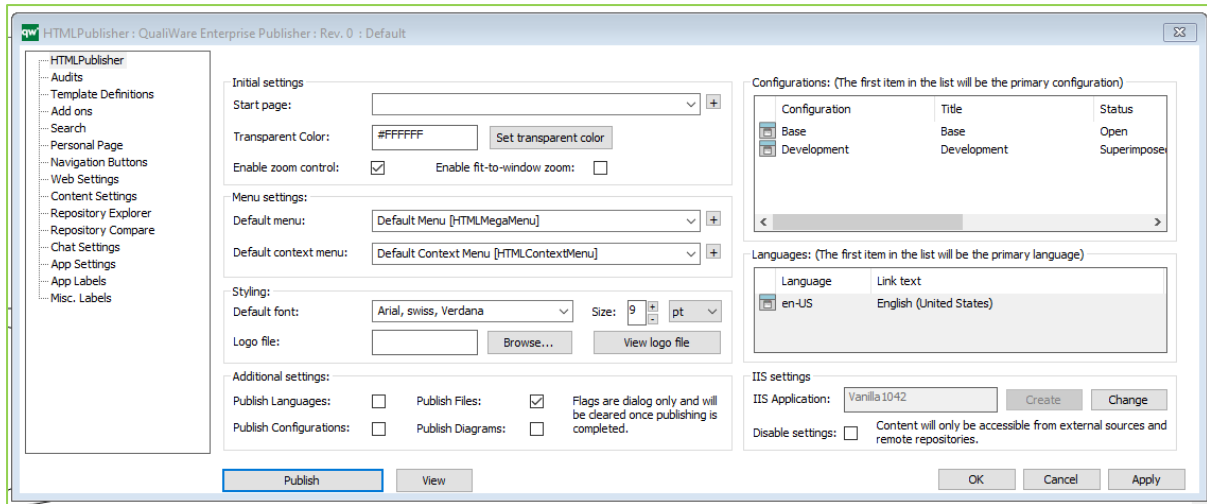


Figure 37: In QLM select publisher (CTRL+ H)

Do the following steps in the HTMLPublisher:

1. Create the IIS
2. Select “Publish Files” and click “Publish”
3. Select “Publish Languages” and “Publish Configurations” and click “Publish” (Make sure Configurations and Languages are populated)
4. Select the above and “Publish Diagrams” – select all Diagrams – and click “Publish”
5. Select View and see the result

Your upgrade is done - congratulations.

Appendix 6. Extra step in relation to a regular update

The license folder must point to the right license folder.

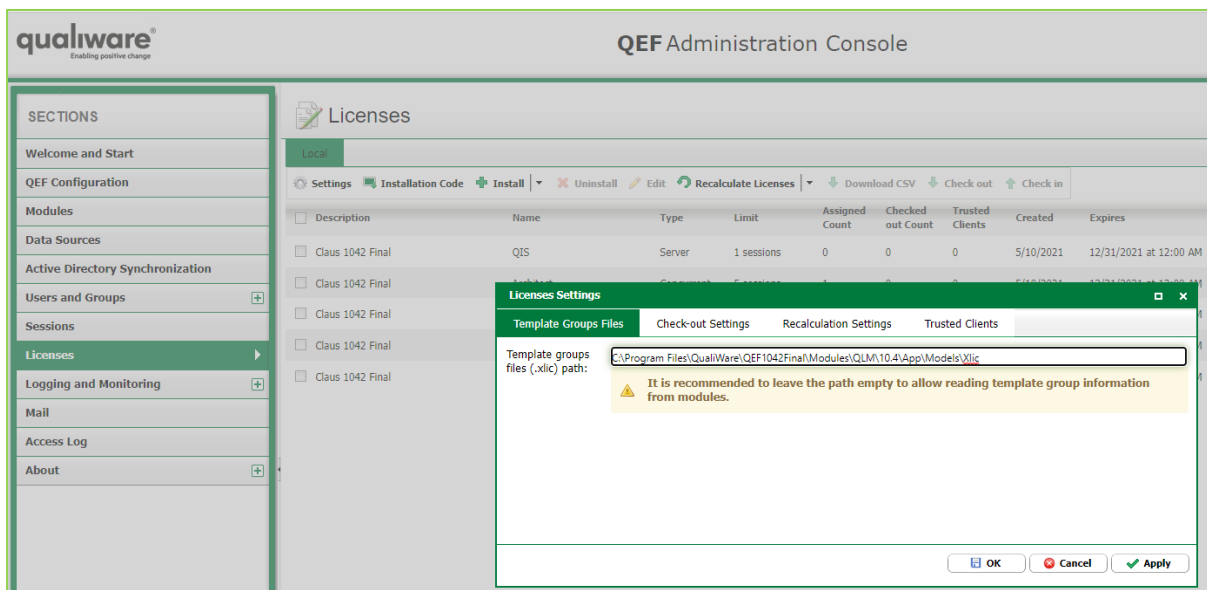


Figure 38: Under settings find the license folder

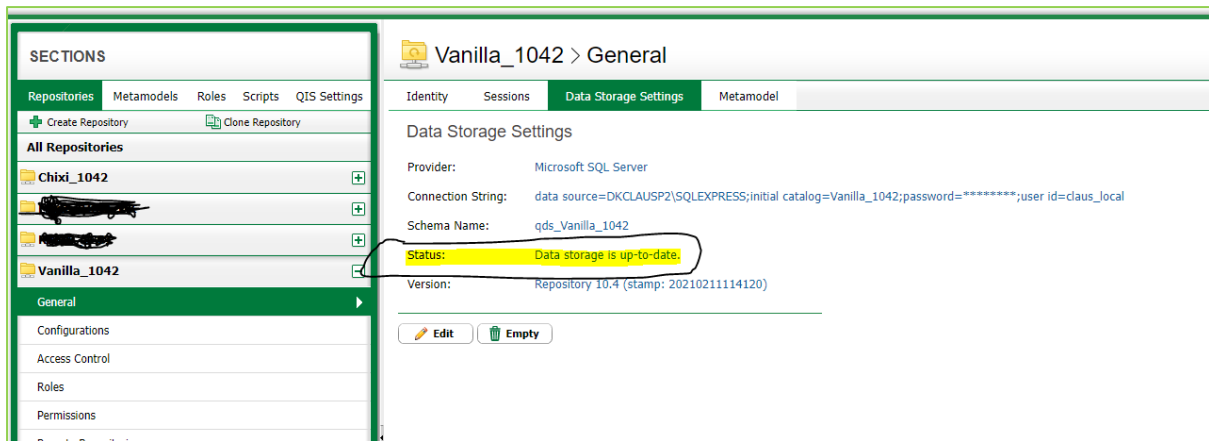
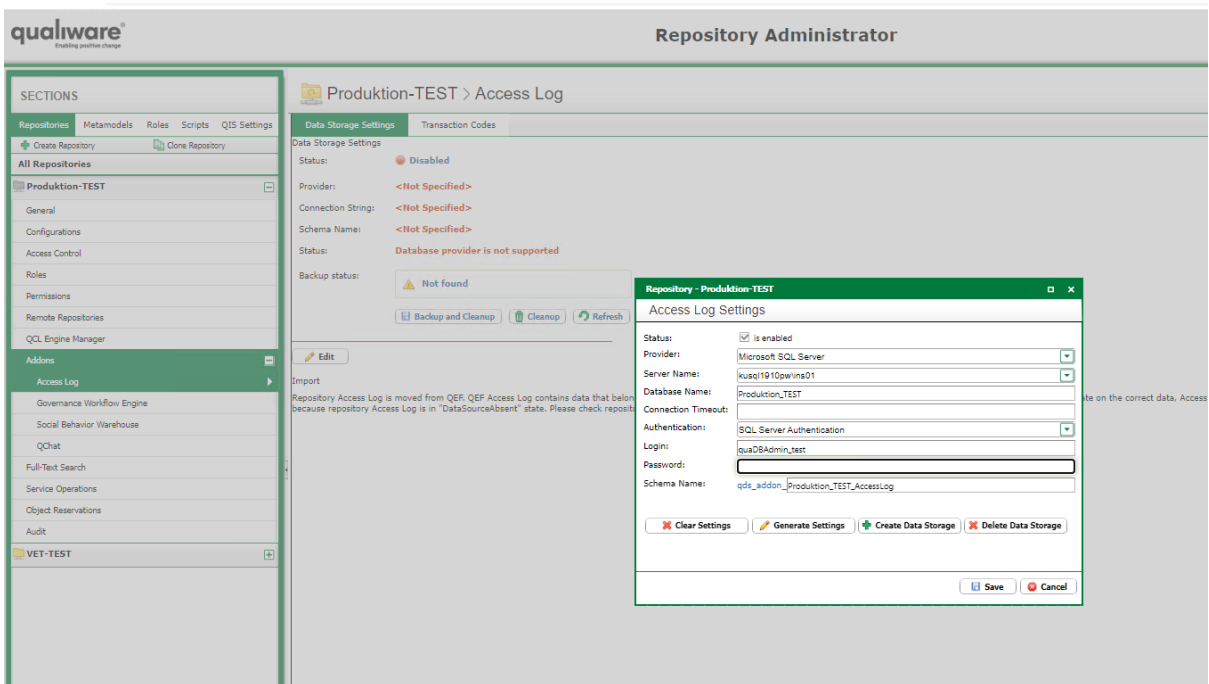


Figure 39: Update data storage to a new release



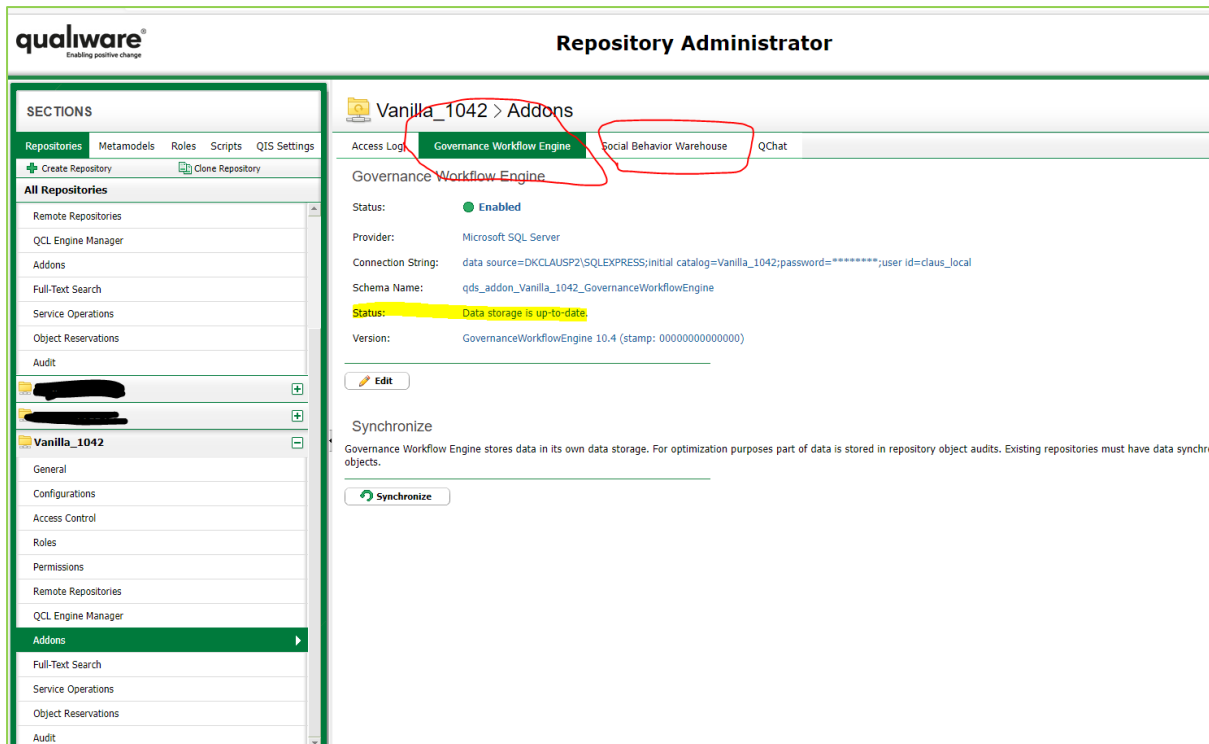


Figure 40: Update data storage for Governance and Social Behaviour Warehouse

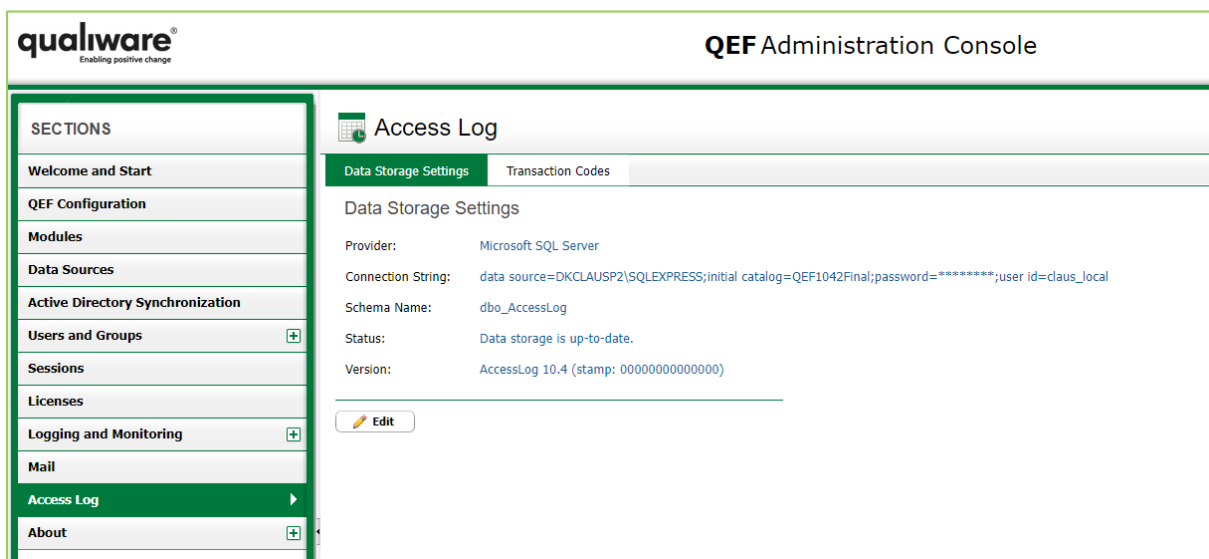


Figure 41: Update data storage for Access Log (10.5)

For Access Log update in 10.8 then please refer to:

[Upgrade to 10.8 \(qualiware.com\)/Section 5](https://qualiware.com/Section 5)

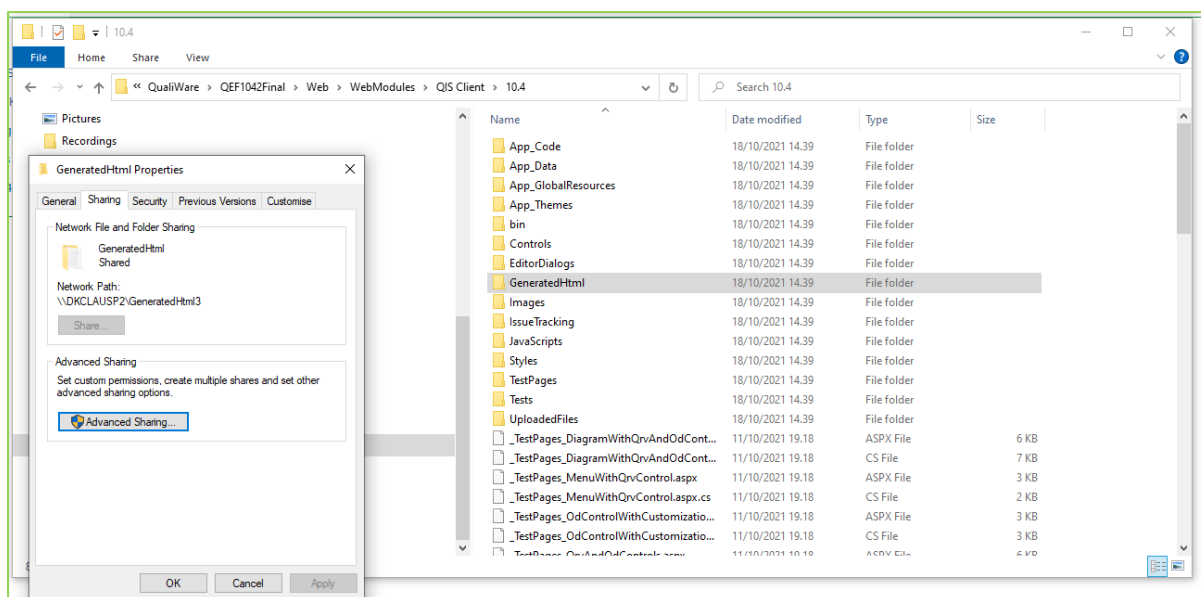


Figure 42: Settings for GeneratedHTML folder in the installation

When upgrading from one version X to another the version is included in the patch for the content for the WEB. Two things must be ensured:

1. The original folder must be unshared and the new must be shared
2. All access from the original must be ensured in the new folder

Appendix 7. How to update QualiWare licenses

If the installation involves changes in the server configuration, then the licenses might be requested to be renewed. How to renew the licenses is covered in the section.

The similar process must be followed when the licenses expires or if the server changes by reason not related to an upgrade.

Prerequisites:

A license file from QualiWare

Access to the QualiWare Execution Framework (QEF) and permission to install licenses

The process:

The following steps will show you how to update your expired licenses setup with the new license file. Updating the licenses, rather than reinstalling, will refresh your pre-existing license, thus retaining the Active Directory configurations.

There are 2 steps: Selecting the licenses you wish to update and then submitting the license file.

Step 1: Select the licenses



Figure 43: Select the licenses in QEF/Console

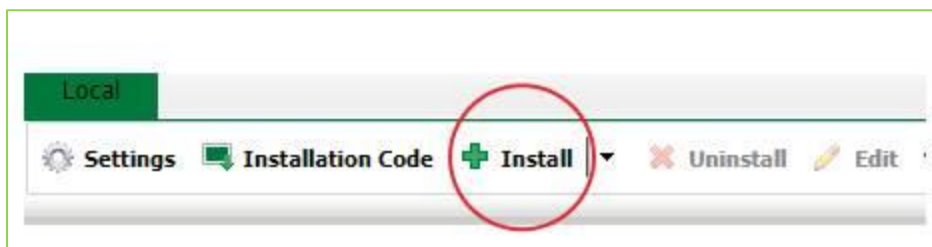


Figure 44: Select the Install menu in the top



Figure 45: Select the Updated Selected

Step 2: Submit the license file

You can submit the license file in 2 different ways, and it is only a matter of convenience which one you pick.

- If you wish to copy-paste the content of the license file, you can do so in the *From XML String* tab
- If you wish to upload the license file directly from the browser, you may do so in the *From File* tab

After this simply do:

- Click OK and the licenses will be updated.
- Click the Install button and select *Update Selected*
- Check the checkboxes left of the licenses that you wish to update.

Appendix 8: Shared folders

There are two shared folders:

- QLM
- Generated HTML

The screenshot below illustrates how both are changed in relation to an upgrade.

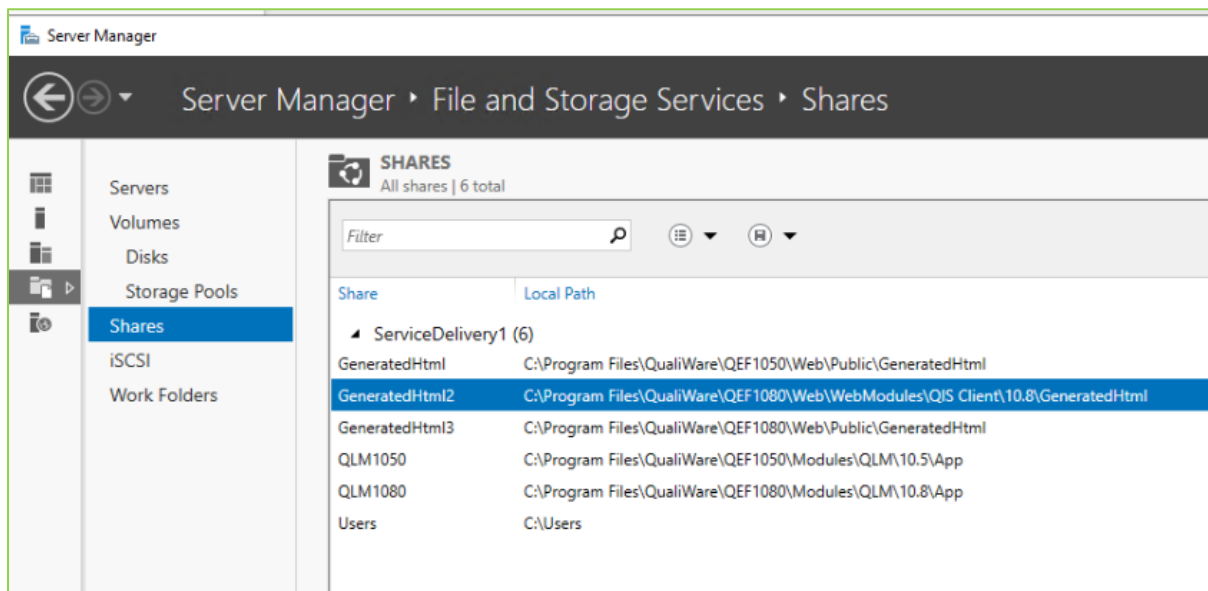


Figure 46: Shared folders in 10.5 (and earlier) and 10.8

From the paths above it can be seen that the folder for GeneratedHtml is completely new while the folder for QLM has the same structure.

In case of upgrade please ensure that the same security groups are found by the new shares as the previous. Furthermore, please ensure that the previous is unshared and the new shared.