

FAQ – Upgrade Instructions for QTRAK

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QA software

1. Before you start

These instructions are for QTRAK users upgrading from an existing version of QTRAK to the latest QTRAK version in the 5 series.

Important: Check the following:

§ If your version of QTRAK begins with a number 2 eg 2.11.4, DO NOT follow these instructions but rather contact QA Software for assistance.

Important: Note that all workstations running QTRAK version 4 or below require the latest QASYS files to be installed on their PC to run QTRAK version 5. See Section 11 below.

2. Determine which Folder QTRAK is installed in and what version you have

- a) Run QTRAK and login to any project.
- b) On the left hand side of the screen the file path is listed under the QA Software logo.

The *QTRAK Program Folder* is: _____

- c) Also on the left hand side or bottom of the screen will be your version number (eg 3.40.07)

Your *QTRAK Version number* is: _____

3. Backup your QTRAK Installation

The following backup procedure is recommended:

- a) **Quit** all QA Software Products (QTRAK, QDMS, etc) on all machines.
- b) Run Windows Explorer.
- c) Create a folder called ZQABACKUP on your c: drive.
- d) Copy the *QTRAK Program Folder and Global Folder* to C:\ZQABACKUP (Typically this is simply done by copying the QASOFT folder with all sub directories. Alternatively if you have other QA Software products installed, copy the Qasoft\QTRAK folder with all sub directories plus the Qasoft\Global folder.)

WARNING: PLEASE ENSURE YOU HAVE BACKED UP YOUR INSTALLATION BEFORE PROCEEDING

4. Extract the Upgrade Files

The upgrade files will have been sent to you as a Zip file UPDATEQTRAK.ZIP.

- a) Unzip the UPDATEQTRAK.ZIP file into a temporary folder – eg C:\TEMP
- b) If you have a folder called **C:\UPDATEQTRAK** delete it.
- c) From within windows explorer, double click on the file **UPDATEQTRAK.EXE** which will have been unzipped into the folder C:\TEMP at step (a) above.
- d) Click on **UNZIP** at the Self Extractor Window. **Do not change any other settings.**

This will extract the QTRAK upgrade files to the C:\UPDATEQTRAK folder.

5. Rename the existing EXE (Version 3 users only)

Note: This step applies to ALL users upgrading from a version of QTRAK that starts with the number 3. If your QTRAK version starts with the number 4 or above you do not need to do this step.

- a) Make sure there are no users running QTRAK.
- b) Using windows explorer, locate the file **QTRAK.EXE** in the \QASOFT\QTRAK folder.
- c) Rename the file **QTRAK.EXE** to **QTRAK###.EXE** where **###** is the QTRAK version number (without full stops) that you wrote down at Step 2(c) above. Eg QTRAK345.EXE if your current version is 3.4.5

6. Compact files before upgrade

Compacting files is important before the upgrade as this will re-build the indexes of tables.

- a) Check that no one else is using QTRAK (the upgrade will not work if someone else is in the system).
- b) Run QTRAK by double clicking on the QTRAK.EXE file in the QTRACK folder and login to any project.
- c) From the **File Menu** choose **Files Compact**.
- d) Select **All projects** from the option group and click **OK**.
- e) This process can take some time to complete.

7. Run the QTRAK Upgrade Wizard

- a) Check that no one else is using QTRAK (the upgrade will not work if someone else is in the system).
- b) Run QTRAK by double clicking on QTRAK###.EXE file (Version 3 Users - See step 5c above) or the QTRAK.EXE file (Version 4 or 5 Users) and login to any project.

To run the Upgrade wizard:

- a) From the **Tools Menu** choose **Upgrade QTRAK**.

Note:

This process may consume a lot of network resources. It may be advisable to either run the upgrade from your server machine, or temporarily copy the application to a local drive and run the upgrade.

You will be presented with an Update Window.

- b) The correct folder should default in the **Update From Drive and Directory** field. If this field is empty, type **C:\UPDATEQTRAK** in this field or select this folder.
- c) Make sure **Update all Projects is ticked** (or selected – Version 5 users) and click **OK**.

The Upgrade will begin and a status window will flash in the top right corner of your screen.

*NOTE: If you are prompted with a window titled **Update Custom Class** it means that your existing custom forms and other customisations are not compatible with Version 5 of QTRAK. These need to be fixed by QA Software. This is a free service. See section 10 below on how to proceed from here.*

When the upgrade is complete, QTRAK will shut down and restart automatically. This may take several minutes. The next thing that will happen is that the QTRAK login screen will reappear and you can log in and start work with the new version.

8. Where to Now

There are many new features in the latest version of QTRAK. You can use the integrated Help system after upgrading to find out about these features or contact QA Software for the latest release notes. The Help system can be launched by pressing F1 when in QTRAK.

Note that QTRAK V5 has a new Dashboard concept. Users of QTRAK who were not in the Address Book are added to the Address Book automatically as part of the upgrade process against the Owing company.

9. Activating New QTRAK Mail Forms

If you are an existing QTRAK user and have received a custom upgrade containing new QTRAK Mail Forms you will need to activate these within QTRAK as after installation the default security allocated is for No Access.

To activate additional QTRAK Mail Forms:

- a) From the **Tools** menu select **Security ->Users and Projects**.
- b) Select a User by clicking on their grid link.
- c) Locate the new mail form(s) in the right hand side of the pane.
- d) Click on the **No Access** text and adjust to either; Read / Write, Read Only or No Access.
- e) Repeat steps b) to d) for all other Users.

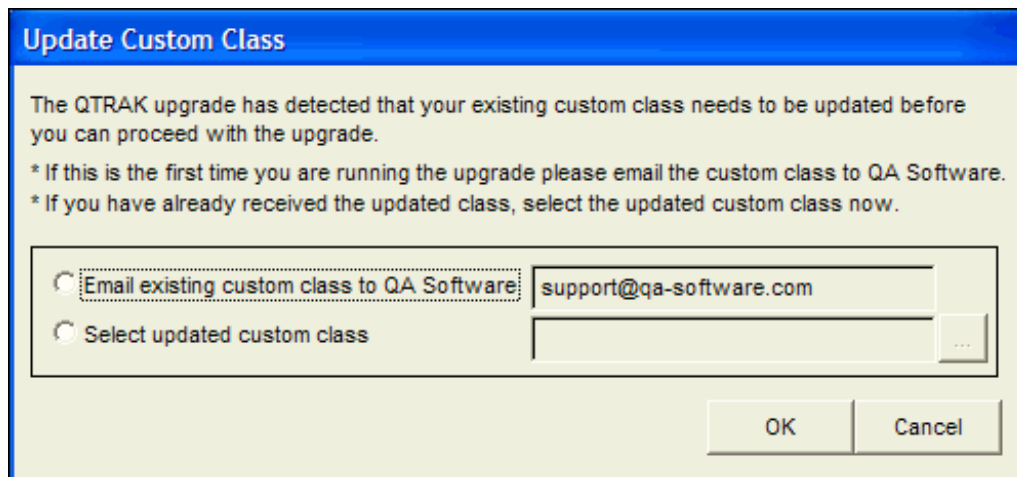
Note that if any User requires the same level of access for all Mail Types then this can be allocated by clicking on the **Apply to All** button in the top centre of the screen and selecting the appropriate level of access.

10. Support

If you are having any problems with getting our software installed or getting started with these upgrade instructions, please don't hesitate to contact our Technical Support Division by Phone: +61 (3) 8379 000, Fax: +61 (3) 9326 6544 or Email: support@qa-software.com

11. Upgrading Version 3 and 4 Customisations

Version 5 of QTRAK uses the latest Microsoft development technologies and your QTRAK version 3 or 4 customisations may not be compatible with these. The QTRAK Version 5 upgrade will automatically check your customisations for compatibility with Version 5 and if any problems exist when you run the upgrade in Section 7 above you will be prompted with the following window:



If this is the first time you are running the upgrade, select the first option - **Email existing custom class to QA Software**, to email your custom program files to QA Software to get them updated. You will receive a confirmation message when done and the upgrade process will terminate.

Note: If you do not get a confirmation message that your custom class has been emailed, contact QA Software for assistance (see Section 9).

QA Software will upgrade your customisations free of charge to be compatible with Version 5 of QTRAK and email you back a zip file. This generally takes 24 – 48 hours from time of receipt.

You will need to undo the steps performed in Section 3 (if they applied to you) to continue working with your existing version while QA Software upgrade your customisations.

Once you receive the zip file of your updated customisations:

- a) Save it into a Temporary folder such as c:\Temp.
- b) Then repeat the steps in Section 3 (if applicable) and Sections 6 and 7 above and again you will get the above window.
- c) This time however, select the second option **Select updated custom class**.
- d) Click on the select button to the right of the window and select the zip file from the Temp folder.
- e) Click **OK** to continue with the upgrade (see last paragraph of Section 7 above)

12. Installing the QASYS files

If you are upgrading a version of QTRAK that is version 4.XX.XX or lower then not only do you need to follow all the steps above but you **MUST** also upgrade the QASYS files on each work station that will be accessing the latest version of QTRAK.

If you do not have a copy of the latest QA Software CD ROM then you should download the latest QASYS files applicable for QTRAK 5.

To do this, visit www.qa-software.com and click on the **Downloads** option on the top menu list and select QTRAK for Correspondence Management. Complete the form and click **Submit**. At the next screen, download item 3 – QASYS files.

To Install the QASYS files (using the QA Software CD ROM):

- a) Close any open applications.
- b) Click on the **Start** button and select **Run**.
- c) Insert the QA Software CD in your CD drive.
- d) Click on the **Browse** button and locate the QASYS folder on the CD.
- e) Select the **Setup.exe** file in this folder and click OK.
- f) At the Run window, click the OK button to start the setup process.

Note that if you have downloaded the QASYS files, simply run the QASYS.MSI file downloaded in lieu of the steps a)-f) above.

During the installation, follow the instructions on the screen.