



erwin Evolve Web
Installation Guide

© 2024 Quest Software Inc.

ALL RIGHTS RESERVED.

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Quest Software Inc.

The information in this document is provided in connection with Quest Software products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of Quest Software products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, QUEST SOFTWARE ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL QUEST SOFTWARE BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF QUEST SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Quest Software makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. Quest Software does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:

Quest Software Inc.

Attn: LEGAL Dept

4 Polaris Way

Aliso Viejo, CA 92656

Refer to our Web site (<https://www.quest.com>) for regional and international office information.

Patents

Quest Software is proud of our advanced technology. Patents and pending patents may apply to this product. For the most current information about applicable patents for this product, please visit our website at <https://www.quest.com/legal>.

Trademarks

Quest, the Quest logo, and Join the Innovation are trademarks and registered trademarks of Quest Software Inc. For a complete list of Quest marks, visit <https://www.quest.com/legal/trademark-information.aspx>. All other trademarks and registered trademarks are property of their respective owners.

Legend

 **IMPORTANT, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

erwin Evolve Web – Installation Guide

Updated – October 2024

Version – 2024.0.0

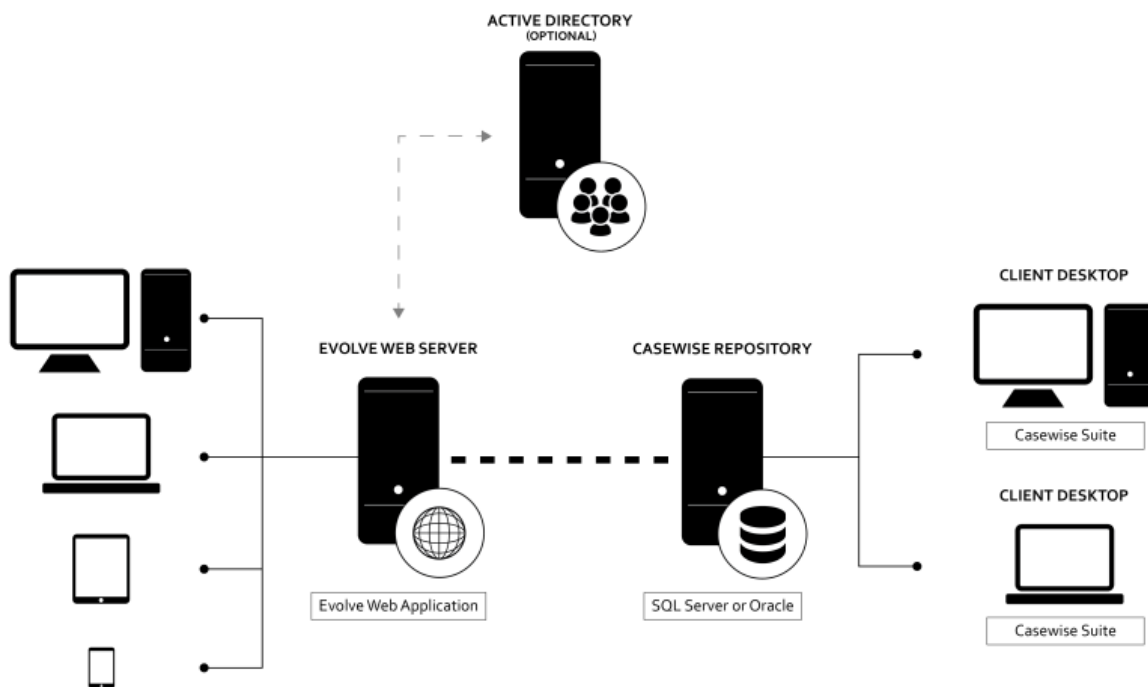
Table of Contents

Requirements and Preparation	5
Installation Overview	5
System Requirements.....	6
Web Server Requirements	6
Database Server Requirements	7
Evolve Suite Client Requirements	7
Evolve Client Requirements	7
Pre-Installation Tasks.....	8
Request Licenses	8
Evolve Suite.....	8
Active Directory Authentication.....	8
Get the Evolve Installer	10
Upgrading	11
Backup your data	11
Upgrading Evolve.....	12
Uninstall and Reinstall Evolve/CW Suite	13
Upgrading from Evolve 3.x	13
Upgrade The Database.....	13
Install new version of Evolve Web Platform.....	14
Run Evolve Designer and continue upgrading from there	14
Upgrading custom themes / less variables	14
Theme File Labelling Convention	16
Custom Logos.....	16
New Installation	17
Installation Instructions.....	17
Create a Connection to the Evolve Repository	17
Apply The Evolve License.....	17
Next Steps.....	18
Information Checklist.....	18
Appendix A – Pre Install Components: Web Server (IIS) Features	19
Appendix B – Post Install Information Checklist	21
Appendix C – IIS MIME Type Support	23
Appendix D – Create a Connection to the Evolve Repository	24
Appendix E – Accessing the Evolve Designer Help	25
Appendix F – Enabling Automatic logon with Active Directory Authentication	25
Client Machines.....	25
Firefox and Google Chrome	25

Appendix G – upgrading YOUR DATABASE FOR evolve 2024.0+ & Evolve Suite 2024.0+	26
About Us	29
Technical support resources	29

Requirements and Preparation

Installation Overview



A typical installation of Evolve requires the following components:

- **A Web Server** - used to host the Evolve Web Application.
- **A Database Server** - used to host the Evolve Repository.
- **An Evolve Suite Client** – used to create and manage models in the repository.
- **Evolve Clients** – used to connect to web sites running on Evolve web sites.

The instructions in this document relate only to the setup and configuration of the Evolve Web Application on the web server machine.

System Requirements

Web Server Requirements

The web server you plan to run Evolve from must meet the following requirements.

TYPE	REQUIRED/RECOMMENDED	NOTES
MEMORY	Min. 8GB (Quad Core) Min. 12GB (6 Cores)	Memory usage increases along with the number of people accessing an evolve site. you may therefore require additional memory with higher numbers of users.
PROCESSOR	a modern server-class processor such as quad core i7	
AVAILABLE DISK SPACE	40GB	
OPERATING SYSTEM	Only the following are supported: <ul style="list-style-type: none">Windows Server 2019Windows Server 2022	The server should have the Role of Web Server enabled. See <i>Appendix A – Pre Install Components: Web Server (IIS) Features</i> for more detail.
.NET FRAMEWORKS	<ul style="list-style-type: none">4.8.0 (provided)	All necessary lower versions of .NET are included in this package. NB: 3.5 should also be selected.
SOFTWARE	<ul style="list-style-type: none">Microsoft Internet Information Services (IIS) 10.0IIS Manager	The following MIME Type extensions are required in IIS: <ul style="list-style-type: none">.eot /.json /.ttf /.woff /.woff2 See <i>Appendix C – IIS MIME Type Support</i> .
USERS AND PERMISSIONS	<ul style="list-style-type: none">The user who installs Evolve Web Platform needs Administrator rights on the web server machine.The Evolve Designer user must be able to run the application as Administrator for some functions.So Evolve Web Platform can connect to the Evolve Repository, you need the login details of a Evolve System Manager.	



If any user accessing the Evolve Web Platform sites using Internet Explorer, you must ensure that the **name of the server** you installed Evolve on **must not include any underscores**.

Any issue with Internet Explorer, that mean there is an underscore in the name and thus user faces issue while logging.

Database Server Requirements

This guide assumes you already have a database server set up for Evolve Suite use.

If the Evolve Database connection is using Trusted Mode, ensure that users running the IIS application pool have access to the database.

There are no additional database requirements for running Evolve Web Platform.

Evolve Suite Client Requirements

This guide assumes you already have a Evolve Suite client set up. There are no additional database requirements for running Evolve.

Evolve Client Requirements

For end-users the only requirements are for internet browser software. The following are supported:

- Google Chrome v116+
- Firefox v117+
- Microsoft Edge v116+

If you plan to use Automatic Logon for users to log on to Evolve, please see Client Machines [Appendix F – Enabling Automatic logon with Active Directory Authentication - Client Machines](#) for details on specific settings required for the browsers.

Pre-Installation Tasks

Before you start installing Evolve Web Platform, you should ensure the following items are addressed.

Installation will be easier and more straightforward if you have completed all the relevant tasks below before you start.

Request Licenses

You must request licenses for Evolve from the Quest Support Team. **These are required for the installation and Site configuration steps.**

Evolve Suite

This installation guide assumes that you have already installed, licensed and set up Evolve Suite environment, including at least one client machine and the database on the database server.

For instructions on installing and setting up Evolve Suite, please refer to the Evolve Suite Installation Guide.

IIS Components

Evolve Sites require Web Server (IIS) configuration steps to be undertaken before the application can be installed. In particular, the Web Server (IIS) Role must be installed first before all other features.

Please refer to *Appendix A – Pre Install Components: Web Server (IIS) Features* for a full list of Role-related IIS features to install.

Create a Dedicated Evolve User for Dynamic Sites

Evolve Dynamic Sites require the logon details of a Evolve System Manager user in order to connect to the repository to retrieve data. We recommend that you create a dedicated user in Evolve Suite for this purpose, and name it 'EvolveSystem'.

Active Directory Authentication

Evolve can be configured to interact with Active Directory for user login on Dynamic Sites. If you plan to use Evolve with Active Directory, there are two things you should do in preparation.

1. Choose a Compatible Logon Option for Evolve Suite

When using Active Directory Authentication, you must make sure that your Evolve Suite deployment is configured to use a compatible logon option.

We recommend that you use Option 2 - '*All users logon via the current Windows user name*', as this will mean your users will be logged on automatically when visiting your Site.



Please see [Appendix F – Enabling Automatic logon with Active Directory Authentication](#).

You can also use Option 3 - '*All users logon via any valid Windows user and domain*', but this will mean Evolve users have to enter their logon details to access the Site.

You can change the Logon Option in Evolve Suite using Corporate Exchange Access Manager in Model Explorer.

To do this, log on to Evolve Suite as a System Manager, then, in the **Administration View** of **Model Explorer**, select a model and choose **Tools > Corporate Exchange Access Manager**. In Corporate Exchange Access Manager, choose the **System Options** tab, then choose the **Logon Options** tab.

2. Create Active Directory Groups

You should prepare two Active Directory Groups to organize your users:

- **A group for Evolve Social Users** – for users with Read-Only access to any data
- **A group for Evolve Contributors** – for users who can create and edit data.
- **A group for Evolve Diagram Editor Users** - for users who can create, edit data and diagrams (if this option is enabled).

You do not need these groups set up for installation, but they will need to be in place before an Evolve Administrator can publish a Dynamic Site which uses Active Directory Authentication. You will of course need to add users to the groups.

Get the Evolve Installer

Evolve 2024.0.0 (11.12.x.x) is compatible with Evolve Suite 2024.0 (11.12.x.x) The name of this version is:

- ErwinEvolveWebPlatform_2024_0_0_9.exe

Please ensure you use the correct setup file for your version of Evolve Suite.

Upgrading

If you are upgrading, ensure that you note the following:

- erwin Evolve 2024.x is only compatible with erwin Evolve Suite 2024.x. so you may have to upgrade your entire Evolve environment to use it.
- If you use erwin Evolve Web Platform and erwin Evolve Suite **on the same machine**, it is necessary to ensure that **both products** are at the **same version**.
For example, erwin Evolve 2024.0 and erwin Evolve Suite 2024.0.
Note that other machines can continue to run any other version of erwin Evolve Suite that is 2024.0.
- Upgrading to erwin Evolve Suite 2024.0 and erwin Evolve 2024.0 requires a **complete uninstall** of all erwin CW products. For more information, refer to the **CW Suite 2024.0 Installation Guide**.
- If you use erwin Evolve Web Platform and erwin Evolve Suite on the same machine, you should uninstall Casewise Services, erwin Evolve, and then uninstall erwin Evolve Suite. Only then you should install the new erwin Evolve Suite, followed by the new erwin Evolve



Important:

Casewise Portal, Casewise Publisher and Web Services ARE NOT SUPPORTED with Evolve Suite 2020+ and Evolve 4.7+ (2020.0+). However there has been a replacement REST API available inside erwin Evolve Web Platform, since CW Evolve 2018.1

Backup your data

IMPORTANT: Because upgrading involves making changes to your metadata, we highly recommend that you backup your Evolve Repository before proceeding with the upgrade.

Back up your Evolve Site and Content folders (usually in C: Casewise\Evolve, or C:\erwin\Evolve) if you want to re-use site resources.

If you have custom Sites, ensure you back up Site\bin\webDesigner\custom\.

If you have custom Emails for Workflow, ensure you back up Site\bin\SMTP>Email Templates.

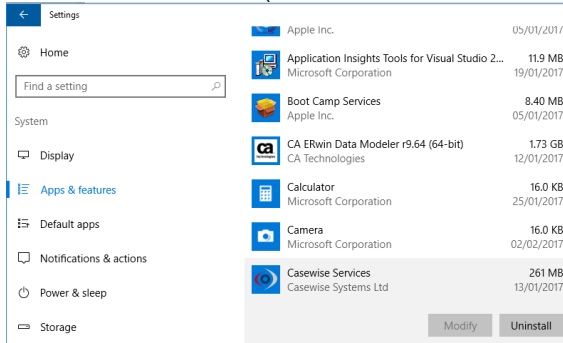
Upgrading Evolve

Before installing the new version, uninstall Evolve on the machine. **Note:** Before uninstalling Evolve, ensure that no Evolve applications are running.

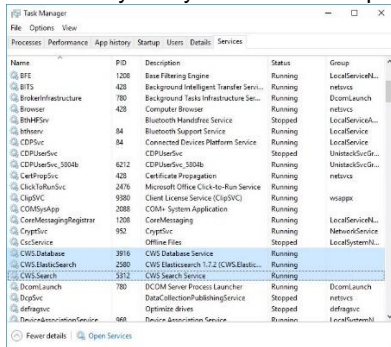
Back up any custom Layouts separately.

To uninstall your old Evolve:

1. First, backup your SQL Database, so that any updates can be reverted if they don't work.
2. Uninstall Evolve Services (or CWS Services for 2020 and older)



To do this you may need to first stop the CWS Services from running.



- When uninstalling any version of Evolve from 4.0 upwards, it is also necessary to uninstall "Evolve Services" or "(CWS) Casewise Services" - the service that operates the Global Search.

The Evolve uninstaller does NOT remove Evolve Services when uninstalling.

3. Uninstall your previous version of Evolve Web Platform 2022, (Evolve 2020, Evolve 2018 or Evolve 2016)
A restart may be required.
4. Uninstall your previous version of Evolve Suite 2022, (CWSuite 2020, CWSuite 2018 or CWSuite 2016)
A restart may be required.
5. If you are migrating from Evolve 2018 or older, follow this step, otherwise goto step 6
 - a. Goto your previous Evolve installation folder (defaults to C:\Casewise\Evolve) and rename it to "Evolve_OLD")
This folder is not removed by the installer, as it contains files that were not part of the installation. Keeping this folder can be useful, if you have customizations that you need to copy across. Once you are sure you have all you need from this directory, it can be removed.
Continue at Step 7
6. If you are migrating from Evolve 2020, follow this step, otherwise goto step 7
 - a. Goto your previous Evolve Web Platform folder (defaults to C:\erwin\Evolve)
Inside you will find a folder called 'Data'
Delete this folder - it contains generated content from your sites, that will be recreated when you republish your sites

in Evolve Web Platform 2020. Due to the changes to several folder structures, this step is important.

Go back up a folder, to your previous Evolve Web Platform root directory (defaults to C:\erwin\). Right-click on the 'Evolve' sub-folder, then choose 'Sent to >' - 'Compressed (zipped) folder'

- b. Let Windows compress the remnants of this folder to a backup file. This zip will contain any customizations made to Evolve Web Platform, various settings, and your Global Search cache. This is a useful backup to keep, should you need to revert any changes.



If you are upgrading from Evolve 2011.4, additionally do the following:

- i. Select **Casewise Data Layer**, choose **Uninstall** and follow the on-screen prompts
- ii. Select **CWRuntimes**, choose **Uninstall** and follow the on-screen prompts

Uninstall and Reinstall Evolve/CW Suite



This step only applies if you are upgrading to Evolve/CW Suite 2024.x as well.

Please remember, if you want to run Evolve Suite on the same machine as Evolve, you must install the Evolve Suite client **before** installing Evolve Web Platform, and the product versions should be the same. e.g. 2024

7. If you run the Evolve/CW Suite client on the Evolve Web server, you should uninstall it now by using the Uninstall option in Programs and Features in the Windows Control Panel. Then install the new version in accordance with the installation instructions.

Upgrading from Evolve 3.x

If you are upgrading from a version earlier than Evolve 4.0, please first ensure you have completed the steps in the [Database Migration Guide](#), and then follow the appropriate steps listed below in order to complete the migration process and have your Sites running the new version.



If you have any custom themes, you must copy **all** of the lines below and paste it in **all** theme files for **every** Evolve site that you are deploying.

```
@cwDiagramEditorIconColor: #b7b7b7; //v4.0
```

```
@cwDiagramEditorMenuBackgroundColor: #f1f1f1; //v4.0
```

```
@cwDiagramEditorMenuMainHeaderBackgroundColor: #2372a7; //v4.0
```

```
@cwDiagramEditorMenuSubHeaderBackgroundColor:#2881bd; //v4.0
```

Adding this text to the end of the theme files will upgrade the theme files for the new version

If you are using a custom logo, it is important to note that the new dimensions for the top left logo are 146px x 30px.

Upgrade The Database

8. Follow the steps on [Appendix G – upgrading YOUR DATABASE FOR evolve 2024.0+ & Evolve Suite 2024.0+](#) to upgrade your database.

Install new version of Evolve Web Platform

! **Please remember**, if you want to run Evolve Suite on the same machine as Evolve, you must install the Evolve Suite client **before** installing Evolve.

9. Once you have completed the steps above, follow the Installation Instructions in this guide for installing the new version.

Once you have installed the new version, continue with the upgrading tasks below.

Run Evolve Designer and continue upgrading from there

10. Once the new version is installed, the rest of the configuration takes place via Evolve Designer.

Please ensure you have all the information you need from the information checklist in *Appendix B – Post Install Information Checklist*.

When you run Evolve Designer, open the Help and follow the information for Upgrading.

Upgrading custom themes / less variables

Since Evolve 2016.2.1+ the Themes (LESS variables) are automatically upgraded when performing an 'Update Meta Model & Themes' within Evolve Designer. However, if you find that the variables have not updated correctly, the following instructions will help you to diagnose the issues.

Should a theme still be incompatible with the installed version of Evolve, the following error can appear in Evolve Designer when you Deploy Dynamic/Static site:

```
Create Css file C:\Casewise\Evolve\Data\Common\css\casewise\grey.theme.evolve.css from theme.  
Create Css file C:\Casewise\Evolve\Data\Common\css\casewise\grey.theme.evolve.min.css from theme.  
Input string was not in a correct format.  
Operation Ends - Run for 00:00:24.5888619 seconds.
```

To upgrade the theme to be compatible with the installed version, follow these steps.

1. Ensure you know which default theme your custom theme was based on.
e.g., Evolve7, Grey, Blue
2. Locate a copy of this theme in the new version of Evolve
nb: This can be found in <Evolve-Install-Location>\Casewise\Evolve\Site\bin\webDesigner\themes\
3. Using a comparison tool (e.g. WinMerge) compare your custom theme with the theme located in step 2
 - This will highlight the new variables which have been added since your custom theme was created.
 - Each new variable will contain a comment (e.g. //v4.0.2) showing in which version it was added

```
@cwLoginTextBoxFocusBorderColor: @cwColor2; // v4.0
@cwSiteSelectionTextBackground: @cwColor2; // v4.0
@cwSiteSelectionTextColor: whitesmoke; // v4.03
@cwLoginSubmitButtonTextColor: whitesmoke; // v4.03
```

4. Copy over the new variables so that the custom theme contains the same number of variables as the default theme.

New Variables

Global search

Variable	Default Value
@cwGlobalSearchFocusColor	@cwMenuLeftMainNavigationBackgroundColorActive
@cwGlobalSearchTextColor	@cwMenuLeftMainNavigationTextColor
@cwGlobalSearchBackgroundColor	@cwMenuLeftMainNavigationBackgroundColor
@cwGlobalSearchResultsTextColor	@cwFontTextColor
@cwGlobalSearchResultsBackgroundColor	whitesmoke

Top Bar

Variable	Default Value
@cwTopBarHeight	40px
@cwTopBarBackgroundColor	#ECEFF1
@cwTopBarProfileLinkColor	@cwColor2
@cwTopBarProfileLinkHoverColor	@cwColor2Shade

Login Page

Variable	Default Value
@cwLoginTextColor	@cwTextColor
@cwLoginLabelColor	@cwColor2
@cwLoginTextBoxBorderColor	#CFD8DC
@cwLoginTextBoxFocusBorderColor	@cwColor2
@cwSiteSelectionTextBackground	@cwColor2
@cwLoadingIconColor	@cwAccentColor

5. Restart Evolve Designer and Deploy Dynamic/Static Site

Theme File Labelling Convention

Evolve's LESS variables are named using camelCase whereby the first letter of each word is capitalized – except for the first letter of the whole string. Evolve version numbers are commented out next to any variables that relate to specific Evolve versions. I.e.: //v4.0

Custom Logos

The dimensions of custom logos have been changed, they are now:

Image 1

logo.png

146 x 30 px

Image 2

logo-m.png

112 x 30px

New Installation

This section details how to install Evolve on your web server machine.

Installation Instructions

i If you want to install Evolve Suite 2024.0 and Evolve 2024.0 on the same machine, please ensure that you install Evolve Suite first.
In order to install Evolve, you must be logged on to the machine as a User who has Administrative rights for that computer.
If you allow the setup to install .NET 4.8, your machine will be rebooted automatically after the installation of .NET but before the installation of Evolve. Please ensure you have closed all applications and services before installing .NET 4.8 as you may lose data if they are forced to shut down.

To install Evolve 2024.0:

1. Right-click on the setup file and choose **Run as administrator**

The setup wizard runs

2. Follow the on-screen prompts.

Create a Connection to the Evolve Repository

So that Evolve Web Platform can talk to the Evolve Repository, you must create a connection between the Evolve Data Layer and the Evolve Database. You can create the connection by running Licence Manager, which is installed with Evolve.

! You must run Licence Manager as an administrator. Choose **Run as administrator**
When you create the connection to the repository, the connection must be made **For this computer**
You can find Licence Manager at C:\Program Files (x86)\erwin\CM10\bin\LicenseManager.exe

For detailed instructions on creating the connection, see *Appendix D – Create a Connection to the Evolve Repository*.

Apply The Evolve License

To apply the Evolve licenses, you should import them into your repository using CW License Manager.

Do this by double clicking on the license file.

Next Steps

Now Evolve Web Platform is installed, the tasks on the server are complete. The processes for creating, configuring and deploying an Evolve Site are performed by Evolve Administrator using Evolve Designer which is installed on the web server.

You do this using the **Server Configuration utility**.

All instructions for creating, configuring and publishing Sites are in the Evolve Designer Help, which is accessible from Evolve Designer itself. See *Appendix E – Accessing the Evolve Designer* for details.

! In order to run Evolve Designer you must log in with a Casewise user that has System Manager rights. In addition, certain functions performed by Evolve Designer require that the application is **Run as administrator** on your machine.

Additional operations requiring System Manager level rights include:

- IIS configuration
- IIS feature installation
- Meta Model upgrades

Information Checklist

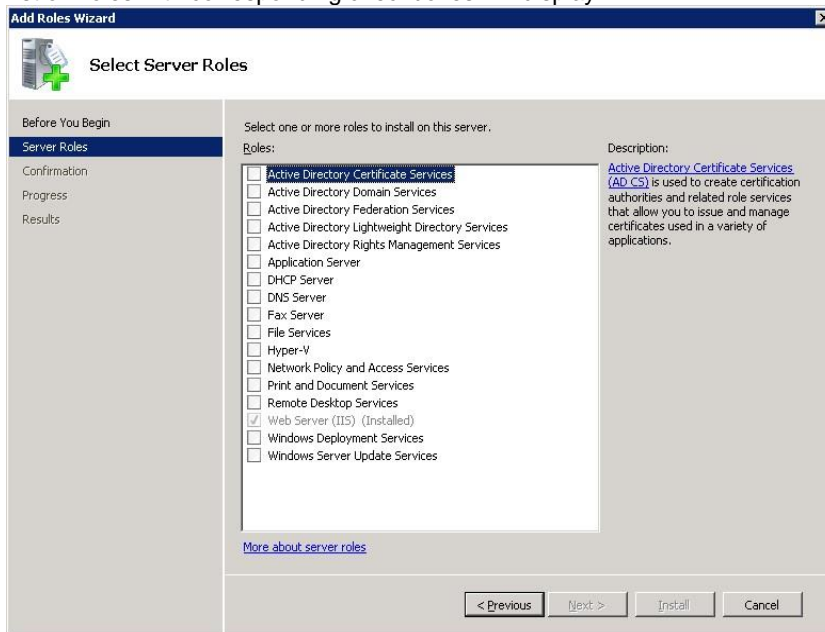
Please ensure you capture all the details needed for the Evolve Designer user to continue with the server configuration. See *Appendix B – Post Install Information Checklist* for details.

Appendix A – Pre Install Components: Web Server (IIS) Features

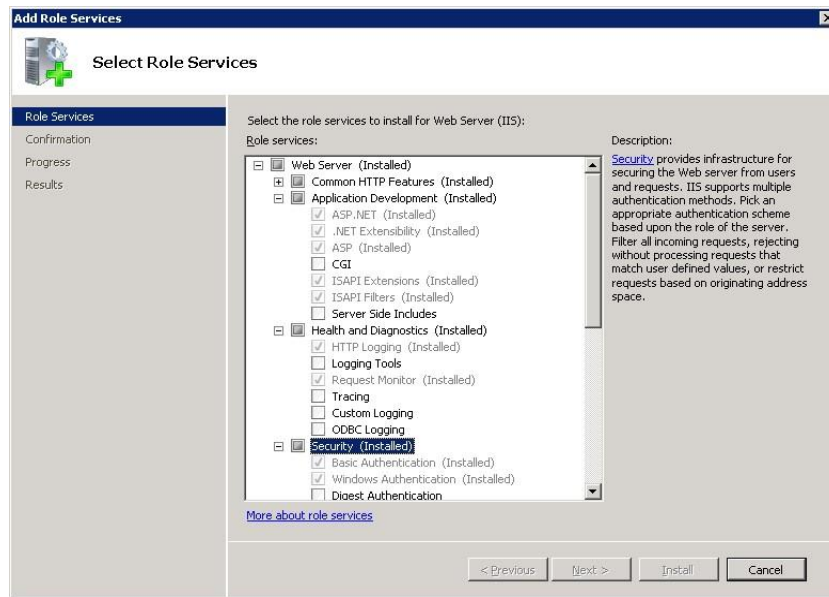
Installation of the Web Server (IIS) Role is required prior to Evolve installation.

To install the IIS Role:

1. Navigate to the *Add Roles Wizard* and select the **Server Roles** option.
2. A list of Roles with corresponding checkboxes will display:



3. Check the **Web Server (IIS)** box.
4. Press the Next button.
 - The Web Server (IIS) role will expand to list the different features to be installed:



5. Check the related checkboxes to install the following features:

Application Development Features:

- .NET Extensibility 4.7 (or above)
- .NET Extensibility 3.5
- ASP.NET 4.7 (or above)
- ASP.NET 3.5
- ISAPI Extensions
- ISAPI Filter
- WebSocket Protocol (for the Diagram Editor)

Performance Features

- Dynamic Content Compression
- Static Content Compression

Common HTTP Features:

- Static Content
- Default Document
- Directory Browsing
- HTTP Errors
- HTTP Redirection

Security

- Basic Authentication
- Windows Authentication
- Request Filtering

Health and Diagnostics

- HTTP Logging

Appendix B – Post Install Information Checklist

In order to create an Evolve Site, the following information gained from the installation needs to be available to the Evolve Administrator:

TYPE	DESCRIPTION	REQUIRED FOR	DEPLOYMENT TYPE
IIS USER	<p>The Username and Password of a User of the web server machine that the Evolve application can run as.</p> <p>This User must have Administrative rights on the web server machine.</p> <p><i>Note: When Active Directory Authentication is used, this IIS User must be part of the domain.</i></p>	ISS Configuration when Creating a Site (post installation), or during manual setup of IIS.	Dynamic Static
CW SYSTEM MANAGER USER ACCOUNT	When running Dynamic Sites you must enter the details of a Casewise System Manager User.	This account is used by Evolve to access the repository.	Dynamic
ACTIVE DIRECTORY USER	The Username and Password for a domain user which can read the Active Directory.	Only required if Active Directory Authentication is to be used.	Dynamic
ACTIVE DIRECTORY CONNECTION PATH	The path to connect to the Active Directory.	Only required if Active Directory Authentication is to be used.	Dynamic
ACTIVE DIRECTORY SOCIAL USER GROUP	The name of the Active Directory group used for Social Users.	Only required if Active Directory Authentication is to be used.	Dynamic
ACTIVE DIRECTORY CONTRIBUTOR USER	The name of the Active Directory group used for Contributing Users.	Only required if Active Directory Authentication is to be used.	Dynamic

ACTIVE DIRECTORY DIAGRAM USER	The name of the Active Directory group used for Diagram Editor users.	Only required if Active Directory Authentication is to be used.	Dynamic
ACTIVE DIRECTORY STATIC USER	The name of the Active Directory group used for Static Site users.	Only required if Active Directory Authentication is to be used, and Static Authentication is enabled.	Static

Appendix C – IIS MIME Type Support

Your web server machine must be configured to understand some specific file formats used by Evolve Web Platform.

You can do this task now, at the Default Web Site level in IIS, **or you can do this later** for the specific Evolve application, once the Evolve Administrator has created it.

To specify the new MIME Types:

1. In IIS Manager's left-hand pane, select the **Default Web Site** node
2. Ensure you have the central pane set to **Features View**, then double-click **MIME Types** in the IIS section
The MIME Types settings are displayed
3. Check the list of extensions that are already configured and see if any of the following are missing:
 - .eot
 - .json
 - .ttf
 - .woff
 - .woff2
4. For each extension that is not already configured, do the following:
 - a. Right-click in the central pane and select **Add...**
 - b. Enter the following details, depending on which you need to add

File Name Extension	MIME Type
.eot	application/octet-stream
.json	application/json
.ttf	application/octet-stream
.woff	application/font-woff
.woff2	application/font-woff2

- c. Click **OK**

5. Repeat steps a to c as required and then close **IIS Manager**.

Appendix D – Create a Connection to the Evolve Repository

To create a connection to the Evolve Repository:

1. Run **License Manager**, by right-clicking the file and choosing 'Run as administrator'
2. On the *Logon* dialog, click **Edit**

The *Database Connection* dialog is displayed

3. On the *Database Connection* dialog, click **Add > SQL Server > For this computer**

The *Configure SQL Server* dialog is displayed

4. Complete the required fields as described below:

Mandatory fields are suffixed with an asterisk (*).

Field	Description
Connection name *	This is the name that you assign to this connection. It will be shown in the database drop-down list that the person using Evolve Designer machine will see when they log on.
Server name *	This is the IP Address, Physical Computer Name or DNS of the database server machine.
Instance name	If you have more than one instance on the same Server, you can enter the name for that instance here.
Port number	A number referring to the hardware device that contains the database to be connected to
Database name *	The name of the Evolve Database itself.
User name	Username and password are for 'SQL server user authentication. The login requires SQL authentication, and won't work with Windows Authentication'.
Password	The correct password for the previous user name.
Confirm password	Same as above.

5. Click **OK**.

The connection is created and tested.

Appendix E – Accessing the Evolve Designer Help

The help for using Evolve Designer to create, configure and manage your Site can be accessed using the Help menu link in Evolve Designer.

Additionally you can access the help here:

[erwin Evolve - Technical Documentation \(quest.com\)](http://erwin Evolve - Technical Documentation (quest.com))

Accessing the help with Internet Explorer on a server machine

If you try to access the help directly from a server machine, such as when using Evolve Designer on the web server itself, you may not be able to use it, due to the heightened security on server Operating Systems meaning scripting is disabled.

To enable Internet Explorer to view the Evolve help, go to **Tools > Internet Options > Security** and in the **Custom Level Security Settings**, ensure **Active Scripting** is **Enabled**.

Appendix F – Enabling Automatic logon with Active Directory Authentication

Client Machines

Firefox and Google Chrome

Firefox and Google Chrome users have to enter their username and password once, but can choose to have the details remembered to avoid entering them again.

Appendix G – upgrading YOUR DATABASE FOR evolve 2024.0+ & Evolve Suite 2024.0+

These instructions explain how to update your database for 2024.0.0 database.

- ! **Before beginning the upgrade process you must make sure that your database user has DBA permissions.** It is also *STRONGLY advised that you backup your SQL database prior to upgrade, as any failures during upgrade may not be reversible.*

Step 1 - Uninstall Evolve & Evolve Suite

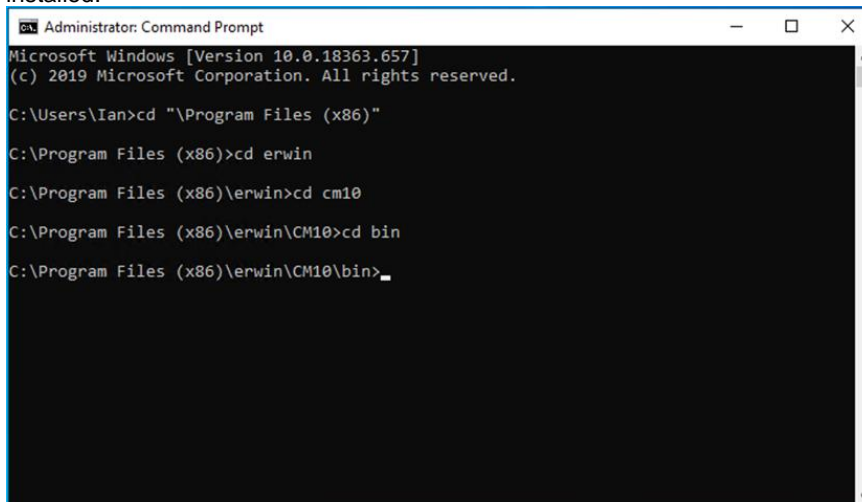
1. It is recommended that you back up your database and any customisations that you have made to Evolve before commencing with the database upgrade.
2. Uninstall any versions of Evolve and Evolve Suite currently installed on your system.

Step 2 - Install Evolve Suite 2024.x

1. Log in to your Quest account and download Evolve Suite 2024.x
2. Install Evolve Suite 2024.x following the information detailed in the installation guide.

Step 3 - Upgrade the Database

1. Run Command Prompt as an administrator and navigate to the 'bin' directory where Evolve Suite is installed.



```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.18363.657]
(c) 2019 Microsoft Corporation. All rights reserved.

C:\Users\Ian>cd "\\Program Files (x86)"
C:\Program Files (x86)>cd erwin
C:\Program Files (x86)\erwin>cd cm10
C:\Program Files (x86)\erwin\CM10>cd bin
C:\Program Files (x86)\erwin\CM10\bin>_
```

2. Type the following: `ValidateRepository.exe -connection:YourConnectionName -username:YourUserName password:YourPassword -upgradedb`

The Validate Repository tool will do various checks and will display the results of these checks as well as a prompt to commence the upgrade.

```

1.1.'Schema Change: NTEXT columns should be NVARCHAR(MAX)/XML':
Checking repository for historical NTEXT columns...
No historical NTEXT columns in the repository.

1.2.'Schema Change: CW_AUDIT Table & Support':
Is Table 'CW_AUDIT' present?           - No
Is the Table 'CW_AUDIT' Grant present?  - No
Are the audit triggers present?        - Yes
Is Function 'CheckForInvalidXml' present? - No
Is Function 'IsAuditEnabled' present?   - No
Is Procedure 'EnableAudit' present?     - No
The current schema is not up to date and compatible with the latest CM f
eature set.

1.3.'Schema Change: Update Diagram Columns':
Are obsolete/unused Diagram columns present? - Yes
Are renamed Diagram columns present?        - Yes
Does proc_copy_model require updating?      - Yes
The current schema is not up to date and compatible with the latest CM f
eature set.

1.4.'Schema Change: CW_CAR Table & Support':
Is Table 'CW_CAR' present?              - No
Is the Table 'CW_CAR' Grant present?     - No
Does get_next_id() SP have required SET options? - Yes
Does proc_copy_model() SP require updating? - Yes
Does proc_delete_model() SP require updating? - Yes
Are the CAR views present?              - No
Are the CAR Views Grants present?       - No
The current schema is not up to date and compatible with the latest CM f
eature set.

Operation executed in 00:00:00.0718090.
Test 'Validate Existing Database Schema' found 14 issues to be fixed:
This will attempt to upgrade the repository schema to the current version.

1.2.'Schema Change: CW_AUDIT Table & Support' Fixes:
Creating Table 'CW_AUDIT'...
Adding Table 'CW_AUDIT' permissions...
Creating the 'CheckForInvalidXml' function...
Creating the 'IsAuditEnabled' function...
Creating the 'EnableAudit' procedure...

1.3.'Schema Change: Update Diagram Columns' Fixes:
Removing obsolete/unused columns...
Renaming Diagram columns...
Recreating proc_copy_model() SP...

1.4.'Schema Change: CW_CAR Table & Support' Fixes:
Creating Table 'CW_CAR'...
Adding Table 'CW_CAR' permissions...
Recreating proc_copy_model() SP...
Recreating proc_delete_model() SP...
Creating CAR Views...
Adding CAR Views permissions...

Initiating the migration process:

*****
*** NB: THIS OPERATION WILL CHANGE DATA WITHIN YOUR DATABASE. ***
*****

Are you sure that you wish to proceed with the upgrade? (Y)es/(A)ll/(N)o: y

```

If your user does not have DBA permissions you will see the following message:

```

*****
*** NB: The current user does not have the following required permissions to
run the required fixes:
CREATE TABLE
CONTROL
ALTER
CREATE FUNCTION
CREATE PROCEDURE
Please consult your DBA.
*****

```

If you see this message you should not proceed with the database upgrade.



Additional Step if upgrading from an earlier version of 2024:

The Audit trail recording system, and Global Search system in the later versions of 2024 require additional, minor changes to the database. These changes do not affect the desktop product, so there is no requirement to upgrade Evolve Suite on machines, other than the Evolve Server (unless you wish to do so).

Using ValidateRepository run the following command:

ValidateRepository.exe -connection: *YourConnectionName* -username: *YourUserName* password: *YourPassword* -applyfixes

```
C:\Windows\System32\cmd.exe

1.2. Schema Change: CU_AUDIT Table & Support :
  Is Table 'CU_AUDIT' present?           - Yes
  Is CU_AUDIT table index present?      - Yes
  Is the Table 'CU_AUDIT' owner present? - Yes
  Is View 'CU_AUDIT_PER_PROPERTY' present? - Yes
  Is View 'CU_AUDIT_UNIQUE_IDHIEES' present? - Yes
  Are the audit triggers present?      - Yes
  Is Function 'CheckForInvalidID' present? - Yes
  Is Function 'IsAuditEnabled' present? - Yes
  Is Procedure 'InhibitAudit' present?  - Yes
  Are Audit Triggers up to date?       - No
  The current schema is not up to date and compatible with the latest CR feature set.

1.3. Schema Change: Update Diagram Columns :
  Are obsolete Diagram schemas present? - No
  Is obsolete Diagram metadata present? - No
  Does Diagram schema require update?  - No
  Does Diagram metadata require update? - No
  Does CU_RESTRICTED schema exist?     - Yes
  Does proc_copy_node[] require updating? - Yes
  The current schema is not up to date and compatible with the latest CR feature set.

1.4. Schema Change: CU_CAR Table & Support :
  Is Table 'CU_CAR' present?           - Yes
  Is the Table 'CU_CAR' owner present? - Yes
  Does get_next_id() SP have required SET options? - Yes
  Does proc_copy_node[] require updating? - No
  Does new_delete_node[] SP require updating? - No
  Are the CAR views present?          - Yes
  Are the CAR View Grants present?    - Yes
  Schema appears valid.

Operation executed in 00:00:01.1194997.
Test 'Validate Existing Database Schema' found 2 issues to be fixed:
This will attempt to upgrade the repository schema to the current version.
*****
*** NO: THIS OPERATION WILL CHANGE DATA WITHIN YOUR DATABASES. ***
*****
Are you sure that you wish to run this operation? (Y)es/(A)ll/(N)o:
*** FIX ABORTED. ***
C:\Program Files (x86)\erwin\CR10\bin>
```

When prompted to apply fixes, review the changes (there may be other faults that need fixing, check you are happy with them) then press 'a' for all.

To install Evolve 2024.0.0+:

Step 4 - Install Evolve 2024.0.0+)

1. Install Evolve 2024.0.0+ following the information detailed in the installation guide.
2. Restore any customisations that you had backed up prior to uninstalling Evolve.

About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product.