erwin Evolve Suite

Installation Guide

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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 Suite – Installation Guide

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About This Guide

This guide explains how to install **Evolve Suite 2024.0.0** and configure the various supported environments within which it can work.

It also details how to install **Document Generator** and **V-Modeler** which are additional Quest products that can also be installed from the Evolve Suite setup.

It is recommended that you print this guide so that you can follow the instructions more easily when performing an installation.

Document Audience

The Installation Guide is intended to be read by end users, system administrators and database administrators who are concerned with setting up a Evolve Suite installation and related Evolve repository configuration.

Document Conventions

Within this document variable names are presented in square brackets.

For example, **[Username1]** represents the name entered by the user to represent the username they will use.

We recommend you note down these values so that they are easily accessible when they are needed for later tasks.

Sometimes these values may need to be shared with other users, for example, when setting up a connection between a Evolve Suite client and a Evolve database, so it is handy to list them down.

Installation Overview

This section explains the different ways that you can work with Evolve Suite,

Document Generator and V-Modeler, and how you set up an appropriate environment.

It is recommended that you read this section before trying to install any of the applications so that you can determine the best system configuration to suit your needs.

Please see the separate System Requirements document for details of the exact software, hardware and environmental requirements for installing and using Evolve Suite.

Evolve Suite

There are four setup configurations for using Evolve Suite. They are:

1. **Stand-alone**

   Where you work independently on your local computer.

2. **Networked**

   Where models are stored on a networked Evolve Repository which can be accessed by many Evolve Suite users.

3. **Terminal Server**

   Where users do not have Evolve Suite installed on their local computers, but use a copy by connecting to a Terminal Server which does have it installed.

4. **Virtual Machine**

   Where the software is installed on a virtual machine.

Stand-alone and **Networked** are not either/or configurations. A standalone user can at any time connect to a Networked database, assuming one exists, and can switch between the two modes.

Likewise, a Networked user can choose to work in stand-alone mode, but this does assume that the client software was installed with the standalone option.

Stand-alone Installations

If you want to use Evolve Suite completely independently of any network, shared database or Terminal Server, then you need a Stand-alone setup.

This means that the software is installed on your local computer or laptop and you will be able to use all its features and store your model data all on the one computer.

To install Evolve Suite so that you can work in stand-alone mode, read the instructions in **Install the Client Software** and ensure that after installation you choose to create the stand-alone database.

Networked Installations

When numerous users within an organization use Evolve Suite, they often access models on a networked Evolve Repository. Depending on the rights granted to each Evolve Suite user, the models in the database can be shared or private.

For this type of setup, each user has the Evolve Suite client software installed on their computers and has it configured to connect to a Microsoft SQL Server database acting as a Evolve Model store.

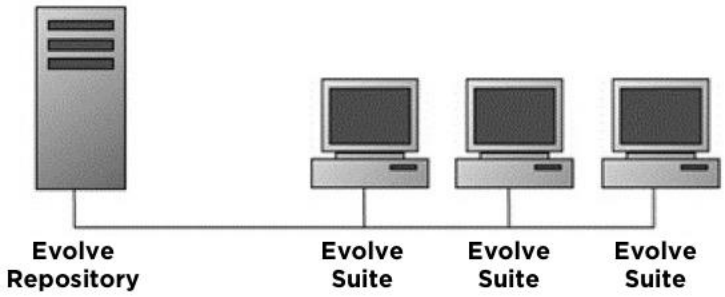


Figure 1.1 Client/server setup with networked repository.

If any of the networked users additionally want the ability to work offline, the client can be installed with a stand-alone database option. The standalone database can be created at any time by running Create Stand-alone Database from the Evolve Suite Start menu.

For information on installing the Evolve Suite client software, see **Install the Client Software** and for information on configuring the Evolve Repository, see **Create a Networked Database.**

Terminal Server Installations

One copy of the Evolve Suite client software must be installed per terminal server machine, each of which runs Microsoft Terminal Services and is accessed by many users.

While Microsoft Terminal Services is the primary supported environment for this type of installation, you can set up a similar environment using other remote access technologies such as Citrix, as long as they are 100% compatible with Microsoft Terminal Services.

For a Terminal Server installation, the client software cannot be installed with the stand-alone database option and must be configured to connect to a networked database that is on a different computer to the Terminal Server/Evolve Suite client.

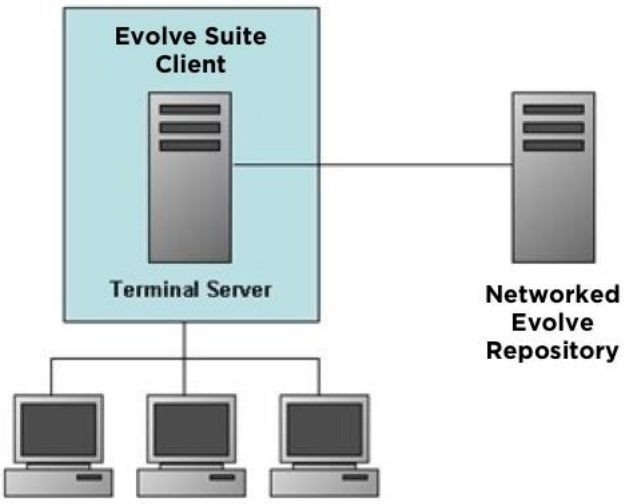


Figure 1.2 Terminal Server system configuration.

For further information on installing Evolve Suite for use with a Terminal Server, please see **Appendix D - Using Terminal Server**

Virtual Machine Installations

Quest does not formally test Evolve Suite in specific virtual environments. If you experience problems running Evolve Suite in a virtual environment, and these problems cannot be reproduced outside the virtual environment, Quest requires that you seek support from your virtualization vendor. Virtual environments must be configured as per the System Requirements for the equivalent real machine.

Quest does not support the investigation of performance issues for virtual environments that have not been configured in line with the System Requirements.

Apart from performance problems caused by inadequate virtual machine resources, Quest is not currently aware of any problems running Evolve Suite on Microsoft Virtual Server or VMware.

Document Generator

Document Generator can be installed by itself, or alongside Evolve Suite, either on a server or a desktop machine.

The only requirements additional to those listed for Evolve Suite are:

- Microsoft Word 2013, 2016, 2019, 2021, Office 365 (32-bit or 64-bit versions)
- A working Evolve Repository to store data.

> The Data Layer and CMXML Export components needed to connect to the repository are installed automatically.

Important:
If you are installing Evolve Suite 2024 on Windows Server 2016 or above, you will need to install Visual Studio 2010 Tools for Office Runtime prior to using Document Generator. These files can be obtained from the Microsoft website.

Failing to install Visual Studio 2010 Tools for Office Runtime may have undesirable effects such as Microsoft Word failing to save the Document Generator add-in.

V-Modeler

V-Modeler can be installed on a machine by itself, or alongside Evolve Suite.

The only requirements additional to those listed for Evolve Suite are:

- Microsoft Visio 2010 or 2013 (**32-bit versions only**)
- A working Evolve Repository to store data.

NB: V-Modeler is no longer a supported product.

While V-Modeler can run on a 64-bit version of Windows, it cannot be installed for a 64-bit version of Visio. Visio has 32-bit and 64-bit versions. Please check which version you are using before installing V-Modeler. To do this run Visio and go to **File > Help** – the About Microsoft Visio section contains the version details.

Install The Client Software

This section describes how to install the client software - Evolve Suite, Document Generator and V-Modeler. All three products are installed using the same setup file.

You can access the setup program by downloading from the Quest website, or by contacting support for a sftp link.

Before You Begin

Before you attempt to install the client software, please read the following important notes:

- **You must have Administration rights** on your computer to install the software. Please see your system administrator for assistance.
- Unless you are installing the stand-alone version of Evolve Suite, it is recommended that you **set up the networked database first**.
- Please check your machine for **pending Windows Updates**, and apply any updates first. Having pending updates can result in errors during installation.
- Please ensure Microsoft Word and Visio are **not running** if you plan to install Document Generator or V-Modeler.
- The setup file for Evolve Suite:

  erwinEvolveSuite_*_**_**_**.exe***

Installing Evolve Suite Instructions

To Install Evolve Suite:

1. Run the Evolve Suite setup file.
2. Follow the on-screen prompts

   On the Custom Setup dialog, choose which software you want to install

3. To install the stand-alone database for Evolve Suite, make sure you select the **Create stand-alone database** option on the final page of the setup wizard, which is displayed once the main product has installed.

Notes on Installing Document Generator

When you first run Word after installing Document Generator, you are prompted to install the Evolve Suite add-in. Once this is installed, you are ready to use Document Generator.

Notes on Installing V-Modeler

When you first run Visio after installing the Quest software, the V-Modeler add-in prompts you to install some additional files. You must shut down Visio and restart it to complete this installation and be able to use V-Modeler.

When you try to use V-Modeler you are prompted to connect to the Evolve Repository. In order to do this you must enter the necessary connection details. We therefore recommend you acquire these details from your Evolve Suite administrator before trying to run the software.

Installation Appears to Have Failed

If you are installing Evolve Suite on a system that has a later version of Microsoft Visual C Components you may receive the following error:

This error will not cause a problem for the application when running and can safely be ignored.

Create a Connection To The Evolve Repository

This section is only relevant to users who want to connect to an existing networked Evolve Repository. If you are only using Evolve Suite with the stand-alone database, please go straight to **What Next?**

> To connect to the repository, you will need the connection details which the database administrator who created your repository should be able to provide.

To connect to your Evolve Repository:

1. Start any program in Evolve Suite

   The Evolve Suite Logon dialog opens

2. Click **Edit**
   - *The Database Connection dialog opens*

3. Click **Add** and select one of the following:
   - SQL Server

The Configure Database dialog opens

If **For this user** is selected, the connection is only available for the specific Windows user who created it.
If **For this computer** is selected, the connection is available to anyone who uses the computer. We recommend using this option if you are creating the connection on Citrix/Terminal Server, or for Evolve use on the Evolve web server.
To see the **For this computer** option, you must run the application as administrator (right-click and **Run as administrator**) which can only be done from Windows Explorer, or the Program search results.

4. Complete all fields in the Configure Database dialog as appropriate

   All the required details should be passed to you by the individual who set up and configured your Evolve Repository.

Field	Description
Connect name *	This is the name that you assign to this connection. It will be shown in the database drop-down list on the Evolve Suite Logon dialog.
Server name *	This is the IP Address, Physical Computer Name or DNS of the database server machine.
Instance name	**SQL Server** Not required by default. However, may be necessary depending on the particular configuration of your SQL Server. See your database administrator for details.
Port number	A number referring to the hardware device that contains the database to be connected to. Not required by default, however may be necessary depending on the particular configuration of your database. See your database administrator for the details.
Database name *	**SQL Server only** The name of the Evolve Database itself, created by the database administrator.
User name	If your Evolve Repository is running on SQL Server, you only need to enter a user name/password if it has been configured to use SQL Authentication. See your database administrator for the details.
Password	The correct password for the user name (above). See your database administrator for the details.
Confirm password	Same as above.

5. Click **OK**.

   The database connection is created. If the connection test fails, please review the details you have entered and confirm them with your database administrator.

WHAT NEXT?

Now you have installed Evolve Suite and created a connection to a shared Evolve Database, if you are using one, you can proceed to use the software as required - see how to log on using the instructions below.

If this is a completely new installation of Evolve Suite with a new shared database, then a nominated user must complete the database creation by loading the Evolve Data and

sample models. To do this see **Appendix A - Load Models into the Evolve Repository** for instructions.

Log on to use Evolve Suite

To log on to use Evolve Suite, search for and run any of the Evolve Suite applications, or use the program launcher by clicking the Evolve Suite icon on your desktop or going to:

Start > All Programs > erwin Evolve Suite > Start Here.

When you start one of the Evolve Suite programs, you are prompted to select a database and log on to it.

Stand-alone Users

If you are using the stand-alone database, you should log on with the Username 'ADMIN' and leave the password blank. You can add a password after you have logged on if you want to make your models more secure.

Networked Database Users

If you are a user in a multi-user environment, connected to a shared Evolve Repository, see your Evolve Administrator for your logon details.

If you are the first user to log on in a multi-user environment, and you will be the model administrator, you should log on with the Username **ADMIN** and leave the password field blank.

It is the Evolve Administrator's responsibility to set up the other Evolve Suite Users, including assigning Usernames and Passwords, or configure the system to use Windows Authentication. See the help supplied with Evolve Suite for information on how to do this.

We recommend that you make the Administration account more secure by adding a password of your choice.

The Administrator should inform the other Evolve Suite Users of their logon details so they can successfully log on to Evolve Suite once they have installed the client software.

Create a Networked Database

This section provides instructions for users who wish to set up a new Evolve Repository on SQL Server.

> The details in this section are intended to be used by an **experienced database administrator** - you should not attempt to perform these tasks if you are not an experienced SQL user.

Before You Begin

It is a prerequisite of this guide that you have already installed Microsoft SQL Server and that it meets the Evolve Suite System Requirements. The database should be on a different computer to the one which you will install the Evolve Suite client software on.

Get The SQL Script Files

We have provided a set of SQL scripts which should be used when configuring the database, so please ensure you have these ready when preparing to set up the database. The script files are available from Quest website. The website files are zipped in files titled:

- **erwinEvolveSuite_MSSQLScriptFiles_****_*_*_*.zip**

Instructions for SQL Server

The following table shows high-level steps for setting up the Evolve Repository on Microsoft SQL Server and **should only be performed by a SQL Server administrator**.

1	**Create a new SQL Instance**	Note the name as: **[database_name]** Make sure the collation is: **Latin1_General_CI_AS**
2	**Run SQL Script Files**	Run each of the supplied SQL Script files against your database, in the following order: 1. CreateMSSQLSchema.sql 2. CreateMSSQLCopyModelProcedure.sql 3. CreateMSSQLDeleteModelProcedure.sql 4. GetNextId.sql 5. CreateCasewiseRWRole.sql 6. GrantAccessToSchemaForCasewiseRWRole.sql
3	**Create a new login**	Create a new login specifically for Evolve Suite use. We recommend using Windows Authentication, however you can also use SQL Authentication if you wish. Note the login name as **[login_name]**

		For Windows Authentication Make sure the User Group you assign to the login includes **all users** who need to access Evolve Suite. **For SQL Authentication** Note the password as **[login_password]**
4	**Create a new user**	Create a new Database User for the Evolve Database **[database_name]** and link the user to the login **[login_name]** you just created. Set Owned Schemas and Membership (Role Members) to **CasewiseRW**

Details Required for Connecting to the Database

Once you have set up the database, you should pass on the following details to a Evolve Suite user so they can create the connection to the repository:

- The name or IP address of the database server
- The instance name, if you created a new instance
- Port number if required
- Database name, noted as **[database_name]**
- Login name noted as **[login_name]** if using SQL Authentication
- Login password noted as **[login_password]** if using SQL Authentication.

WHAT NEXT?

Once the database is created a Evolve Suite user must load the necessary Evolve Data into the repository in order to complete the database configuration. See **Appendix A – Load Models into the Evolve Repository**

Upgrading to Evolve Suite 2024.0

If you want to upgrade from an earlier version of Evolve Suite, then you should read this chapter carefully before installing any software.

If you are in any doubt about how to proceed with upgrading your copy of Evolve Suite, or any standalone components such as
Document Generator or V-Modeler, please contact the Quest support.

In a multi-user environment, where more than one client machine accesses a networked Evolve Repository, you must upgrade all your clients. The user who upgrades the network databases must have administrator rights to the database as schema changes are required to upgrade to this version. Once a Evolve Repository has been used with a newer version of the client software, an older version of the client may not be able to correctly use the database.

NOTE ON PRODUCT COMPATIBILITY - EVOLVE, PORTAL, CMI, CORPORATE PUBLISHER, COLLECTOR & WEB SERVICES

Important:
Casewise Portal & Casewise Publisher are deprecated. There is no version of Portal or Publisher that runs with Evolve Suite 2024. New JSON/REST and XML based webservices are available since 2018.1, please ask Support.

If you are upgrading from Evolve Suite 2022.1 or earlier, and you use other Quest products, such as Evolve, Analytics (CMI), or Collector, then you will need to **upgrade them at the same time** as upgrading your Evolve Suite installation. Previous versions of these products **will not work** with this new version of Evolve Suite.

It is therefore necessary to take the time to plan your upgrade procedure to prevent users of one system trying to use it while another part is being upgraded. All components will need to be taken offline while they are all upgraded. Each of these components have their own installation guides which you should read before attempting to upgrade them.

Upgrade Paths

This guide only includes instructions on upgrading from the following versions:

- 2009.x ● 2011.x ● 2013
- 2015 / 2015 SR2
- 2016 / 2018 all versions
- 2020.0 / 2020.1
- 2022.0 / 2022.1

If you want to upgrade to Evolve Suite 2024.0 from an earlier version than those listed above, please contact Quest support for assistance.

Upgrade Procedure

Important:
If you are upgrading from Evolve Suite 2013, 2015, 2016, 2018, 2020.0, 2020.1, 2022.0, 2022.1 please ensure that you run validate repository on all active databases before you uninstall these versions. This will ensure that the database is in a known state and confirm there are no issues with the current database. This is detailed in Appendix G of this installation guide.

Stand-alone Users

Step 1 – Back up your data

If you use a stand-alone database, we recommend that you backup your data as a precaution. See **Appendix C – Backing up Stand-Alone Data**

Step 2 – Uninstall previous versions

If you are upgrading from CW Suite 2016 / 2018 / 2020.0 / 2020.1 / 2022.0, 2022.1 please uninstall the complete CW Suite in its entirety (and CW Evolve, and Casewise Service – if present).
Then, install the Evolve Suite 2024.0

If you are upgrading from Evolve Suite 2015 SR2 (Build 88), please uninstall the complete Evolve Suite 2015 SR2 in its entirety (and CW Evolve – if present). Then, install the Evolve Suite 2024.0

If you are upgrading from Evolve Suite 2015, please uninstall both Corporate Publisher and Portal. Then uninstall the complete Evolve Suite 2015 SR2 in its entirety (and CW Evolve – if present). Finally, install the Evolve Suite 2024.0.

If you are upgrading from Evolve Suite 2013 or earlier, you must uninstall all previous Casewise applications. It is extremely important that you uninstall these applications in the correct order. Please make sure you uninstall in the order shown below:

1. Evolve Portal or Corporate Modeler Intelligence
2. Communicator 4 Word
3. CMXML Export
4. CW Suite
5. Casewise Data Layer
6. V-Modeler.

If you are upgrading from CW Suite 2016 or earlier, use the Uninstall option in Programs and Features in the Windows Control Panel to **uninstall all Casewise applications** in the order highlighted above.

Step 3 - Install the new software

Follow the installation instructions detailed in **Install the Client Software**

You must have DBA rights in order to successfully upgrade your database. If you were the original installer of Evolve Suite, you will already have these rights. If you are unsure, speak to your database administrator.

Multi-user Environments

If you have more than one repository, such as production and live, then please ensure all repositories are upgraded properly so you do not have issues transferring models between them.
If when upgrading you prefer to work in a test environment, please copy your existing database first and use this as the basis for upgrading.

Step 1 - Prevent users from accessing the repository

Upgrading in a multi-user environment could require a change to the database schema which means anyone accessing the repository using any erwin Evolve Suite application will experience problems.

It is therefore necessary to stop all users accessing the repository while the upgrade takes place.

Step 2 - Back up your data

It is recommended that you back up your database before making any changes. You should use whatever backup procedure you are familiar with, or that is recommended by your database provider.

Step 3 - Uninstall previous versions

If you are upgrading from CW Suite 2016 or earlier, use the Uninstall option in Programs and Features in the Windows Control Panel to **uninstall all Casewise applications** in the order highlighted above on all client machines.

Step 4 - Install the new software on all client machines

Install the latest version on all client machines. Follow the installation instructions detailed in **Install the Client Software**

You must have DBA rights in order to successfully upgrade your database. If you were the original installer of Evolve Suite, you will already have these rights. If you are unsure, speak to your database administrator.

Appendix A - Load Models Into The Evolve Repository

This section explains how to load the necessary Evolve Data and standard models into a **newly-created networked database**. This step must be performed for any new Evolve Repository running on SQL Server otherwise Evolve Suite **will not function**.

The tasks in this section should be performed on a client machine by a Evolve Suite user.

These instructions assume that the database exists, and that the CW client being used has been configured to connect to the database.

To load the Evolve Data and standard models:

1. On the Evolve Suite client machine, in Windows Explorer, browse to the file:

   LoadCasewiseModels.exe

   The file can be found in the erwin Bin directory, (usually C:\Program Files\erwin\CM10\Bin\ or C:\Program Files (x86)\erwin\CM10\Bin\)

2. Run the program

   The wizard starts.

3. Follow the wizard prompts, making sure to select the following options:

   - The target database is your new Evolve Database.
   - In response to the question asking if you are upgrading, reply **No**

4. When the wizard completes, click **Finish**.

   The Evolve Data and models are now loaded into your database and you can log on and use Evolve Suite.

Appendix B - Repair, Modify Or Uninstall Evolve Suite

If you need to repair a Evolve Suite installation, or need to install optional components such as Multi-Language Manager, the Document Generator or the Requisite Pro Link, then you can do so by using the **Programs and Features** application in the **Windows Control Panel**.

To repair or modify the installation, select Evolve Suite and choose **Repair** or **Change**, then choose **Modify** or **Repair** from the installer.

To uninstall Evolve Suite from the machine, select Evolve Suite and choose **Uninstall**.

Appendix C - Backing Up Stand-Alone Data

This section is only relevant if you are upgrading a stand-alone version of Evolve Suite.

The user running the SQL Server service must have write access to the chosen backup folder.
To check the properties of the service, select **Start > Control Panel > Administration Tools > Services**, highlight **SQL Server (MSSQLSERVER)** and go to **Action > Properties** (or right click and select Properties). The Log On tab shows which user the service logs on as – usually Local System.

To backup your stand-alone data:

1. Open a command prompt
2. In the command prompt window enter the following code exactly as it is shown below, and press Return:

```
OSQL -E -S %COMPUTERNAME%\CASEWISE
```

3. Enter the following code and press Return after each line:

```
Backup database CorporateModeler11 TO DISK = ‘<location>\<filename>.bak’ 2> Go
```

<location> is the location where you want to save your backup file, and
<filename> is the name of the file. For example, <location> could be “C:\temp” while
<filename> could be “MyDatabase”, resulting in the following
<location>\<filename>.bak: “C:\temp\MyDatabase.bak”
When the backup has finished the message: “BACKUP DATABASE successfully processed” is displayed.

4. Type **Exit** at the prompt

Restoring Data

This section is only relevant to stand-alone versions and obviously requires that you have previously backed up the data.

To Restore Data in a Stand-alone Database:

1. Open a command prompt
2. In the command prompt window enter the following code exactly as it is shown below, and press Return:

```
OSQL -E -S %COMPUTERNAME%\CASEWISE
```

3. If the Evolve Database already exists in MSDE/SQL Server Express, enter the following code:

```
1> Restore database CorporateModeler11 from disk =
‘<location>\<filename>.bak’ with replace 2> Go
```

If the Evolve Database does not exist, enter the following code to create the database and restore your data

```
Create database CorporateModeler11;
2> Go
3> Restore database CorporateModeler11 from disk =
‘<location>\<filename>.bak’ with replace 4> Go
```

<location> is the location where you saved your backup file, and <filename> is the name of the file.

Appendix D - Using Terminal Server

A Terminal Server installation involves one copy of the Evolve Suite client software being installed on a machine with Microsoft Terminal Services enabled, which is accessed by many users.

Quest supports installations that match the environment described in this chapter, however you can adapt this setup and use it with other remote access technologies, such as Citrix, as long as they are 100% compatible with Microsoft Terminal Services.

System Requirements

Please refer to the system requirements documents available on the Quest website for further details.

> **WHO SHOULD PERFORM THESE ACTIONS?**
> The majority of the tasks in this chapter should be performed by a System Administrator, however there are some tasks for a nominated Evolve user.

Before You Begin

This guide assumes you have already set up your Terminal Server and installed all pre-requisite software.

Configuring Terminal Server

> You cannot install the stand-alone database when running on a Terminal Server. Instead configure Evolve Suite to connect to your networked Evolve Database.

To install Evolve Suite on Terminal Server:

1. Set up and configure a Evolve Database on a different machine to the Terminal Server, see **Create a Networked Database** for further information
2. Set the Terminal Server machine to Install mode
3. Install the Evolve Suite client software on the Terminal Server, see **Install the Client Software**

Appendix E - Migrating Older Models

If you are upgrading from a version of CW Suite older than 2013, **you may not be able to load in some models** that have come from a pre-2013 database.

This is because CW Suite 2013 introduced an updated database schema and older models are not compatible with it.

The Evolve Repository is now stricter about the quality of data that it contains. The import process checks for illegal XML characters in properties (usually caused by copying and pasting text into Evolve Suite), and issues with how Pictures and Publication Sets are encoded. As a result, if any of this data is found when you load models, then those items will not be imported.

These instances are rare, and the likelihood is that your models will be fine.

How will you know if Models are affected?

When you import a model that is affected, the Import Wizard will report exactly which data has been rejected by the import process.

This could be that a Publication Set, Picture, an object instance, or a user-defined property of an object has not been imported.

Recommended Procedures

If you have any existing models that you want to use with Evolve Suite 2024, do the following to ensure there are no potential conflicts before importing the models.

This procedure checks your repository and fixes any legacy issues that are discovered.
To perform this step you must ensure you have elevated database permissions. This means the connection you use when you log on to ***Evolve Suite****, must have database owner (dbo) privileges*

Exactly what you do to achieve this depends on how your repository is configured; whether you use SQL Server, or whether you use a standard SQL Login or use Windows Authentication.
You should ask your Database Administrator to do one of the following:

- Elevate your existing database user to have dbo privileges
- Create a new login with dbo privileges for you to use temporarily.

To perform this operation – you will need to make a new connection in Evolve Suite to use this login.
Your Database Administrator can, and should, remove these elevated privileges once you have successfully migrated the models.

To fix any potential issues:

1. On your Evolve Suite 2024 machine, launch the Command Prompt
2. Change directories until your current directory is the erwin ‘Bin’ directory

   This is usually C:\Program Files\erwin\CM10\BIN, or C:\Program Files

(x86)\erwin\CM10\BIN on 64-bit machines

3. Run the following command to check your repository for illegal XML characters and fix any issues

```
validaterepository -Username:<your_CW_username>
-Password:<your_CW_password>
-Connection:<your_connection_name>
-ApplyFixes
```

Do not copy and paste this command, as it will not work in the command-line tool.

Please pay attention to the following notes:

- If your repository is very large, then this step may take several minutes.
- If your password is blank, you can omit the Password parameter
- Ensure the connection parameter references the database you want to upgrade
- If any of the parameter values have spaces in, enter the entire value in speech marks.

4. When you are asked to confirm if you want to run the operation, choose '**(A)ll**'

Your repository is updated and your models are all validated and fixed where necessary.

You can now export the models for use in Evolve Suite 2024.

Appendix G - Upgrading Your Database For Evolve Web Platform 2024 And Evolve Suite 2024

These instructions explain how to update your database for 2024 database.

> **Important**:
> Before beginning the upgrade process, you must make sure that your database user has DBA permissions.

Step 1 - Uninstall Evolve & CW Suite

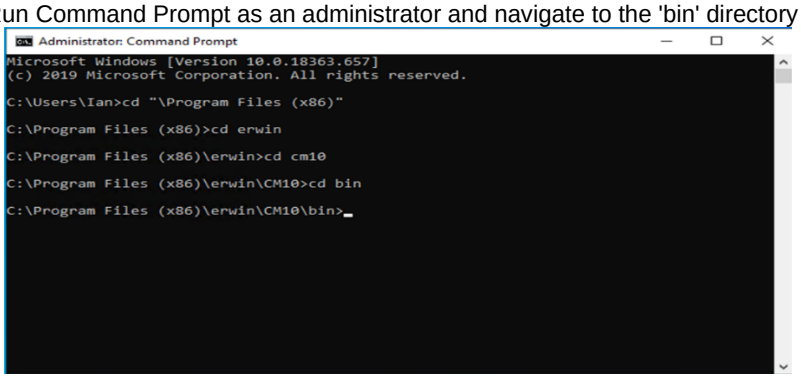
1. It is recommended that you **back up your database and any customisations** that you have made to Evolve before commencing with the database upgrade.
2. Uninstall any versions of Evolve and CW Suite currently installed on your system.

Step 2 - Install Evolve Suite 2024

1. Log in to your https://support.quest.com/erwin-evolve/ account and download Evolve Suite 2024.
2. Install Evolve Suite 2024 following the information detailed in the installation guide.

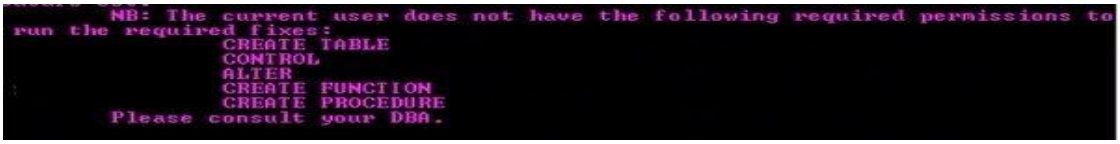
Step 3 - Upgrade The Database

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



2. Type the following: **ValidateRepository.exe -connection:***YourConnectionName* **username:***YourUserName* **password:***YourPassword* **-upgradedb**
3. 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.

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



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

Step 4 - Install Evolve Web Platform 2024

1. Install Evolve WEB PLATFORM 2024 following the information detailed in the installation guide.
2. Restore any customisations that you had backed up prior to uninstalling CW 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.

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iii. Sign up for product notifications
iv. Download software and technical documentation
v. View how-to-videos
vi. Engage in community discussions
vii. View services to assist you with your product.