erwin Evolve Web
Installation Guide

Table of Contents

Legal Notices

i | **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 - Febrary 2025

Version - 2024.0

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	

	Only the following are supported:	
OPERATING SYSTEM	• Windows Server 2019 • Windows Server 2022	The server should have the Role of **Web Server** enabled. See Appendix A – Pre Install Components: Web Server (IIS) Features for more detail.
.NET FRAMEWORKS	• 4.8.0 (provided)	All necessary lower versions of .NET are included in this package. NB: 3.5 should also be selected.
SOFTWARE	• Microsoft Internet Information Services (IIS) 10.0 • IIS Manager	The following MIME Type extensions are required in IIS: • .eot /.json /.ttf /.woff /.woff2 See Appendix C – IIS MIME Type Support.
USERS AND PERMISSIONS	• 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.	

ℹ 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 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.

> **i** 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 groupd 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 2023.0 (11.12.x.x) is compatible with Evolve Suite 2023.0 (11.12.x.x). The name of this version is:

- erwinEvolveWebPlatform_2023_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 2023.x is only compatible with erwin Evolve Suite 2023.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 2023.0 and erwin Evolve Suite 2023.0.
  Note that other machines can continue to run any other version of erwin Evolve Suite that is 2023.0.

- Upgrading to erwin Evolve Suite 2023.0 and erwin Evolve 2023.0 requires a **complete uninstall** of all erwin CW products. For more information, refer to the **CW Suite 2023.0 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 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 my 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 remenants 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.

> ℹ️ 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

> ℹ️ This step only applies if you are upgrading to Evolve/CW Suite 2023.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. 2023

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 Appendix G – upgrading YOUR DATABASE FOR evolve 2023.0+ & Evolve Suite 2023.0+ 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 2023.0 & Evolve Suite 2023.0 to upgrade your database.

Upgrade PSG Tools, aka. CoffeeMaker

If you useCoffeemaker components from the Professional Services Group, refer to the Appendix H - Upgrading Coffeemaker topic and follow the steps to upgrade Coffeemaker. If you do not use CoffeeMaker, you can skip this part.

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

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

New Variables in 4.0

The following variables are new to Evolve 4.0:

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:

Upgrading from Evolve 2.2, 2.3, 2.3.1, 3.0 or 3.1

There are no changed configuration options required for your upgrade, but you must still do the following:

- Run the Server Configuration to complete the upgrade.

- Upgrade Your Database so it works with the new version.

- Update each of your Sites so they work with the new version.

Evolve eModeler

Evolve 3.1 introduces eModeler. To ensure that this new feature is enabled for use across your Sites, see Enable BP modeler.

Upgrading from Evolve 2.1

If you are upgrading from Evolve 2.1, quite a lot has changed in terms of Site configuration and setup.

As such, there are a series of steps you should follow in order to complete the upgrade process.

Instructions for upgrading from Evolve 2.1

These instructions assume you have already upgraded the Evolve application on the web server in accordance with the Installation Guide.

Upgrading to Evolve 2.3 from Evolve 2.1

If you are upgrading from Evolve 2.1 there are several steps you must follow to ensure your Sites are updated to run with the new version.

There are also some changes to file paths and the URLs your Sites can be accessed via that you should understand.

If you previously used Workflow in Evolve, please read this important message:

Important message for Workflow users

The mechanism for providing workflow capabilities within Evolve has **changed completely** in this release.

While any workflows you may have previously configured will still work in Evolve 2.3, **all existing Tasks and Notifications will be lost**.

If you need assistance preserving existing Tasks and Notifications, please contact the erwin Support Team.

Steps for Updating Sites

These instructions assume you have already upgraded the Evolve application on the web server machine in accordance with the Installation Guide..

To ensure a smooth transition to the new version, follow the steps below:

1. *Understand multiple Sites, the new URLs, file paths and directories*

Learn about the URLs, file paths and directories used in Evolve 2.3.

2. *Run the Server Configuration utility*

Use the Server Configuration utility to ensure your Evolve IIS Site is configured correctly.

3. *Update and publish existing Sites*

For each existing Site you want to use in Evolve 2.3, ensure you follow the instructions for Updating an existing Site.

4. *Learn how to create and configure a new Site*

Now Evolve supports multiple Sites, learn how to Create a Site.

Update an Existing Site

These instructions explain how to update an existing Site and configure the settings so it can be published in the latest version. These steps should be followed for **each existing Site** you want to publish in the new version of Evolve.

These instructions assume you have already **upgraded the Evolve application** on your server, and used the Server Configuration tool to configure it.

> There is a **new warning message** displayed when publishing a Site if your model has **more than one template diagram for a Rule and Category** combination.
>
> **We strongly recommend** that if you see this message you revisit your model to **eliminate duplicate diagram templates** for the same Rule and Category, otherwise you could have issues displaying diagrams in your Site.

Step 1 - Check existing custom data and files

Custom Site content

Check that any custom Site content you may have is in the correct location in the Evolve/Site directory.

This is in your Site\bin\webDesigner\custom\<customization-name> directory.

See URLs, file paths and directory structures.

Custom logos

If you use custom logos in your Evolve Site or Sites, the configuration required to use them has changed. Please read these instructions on how to use custom logos on your Site to ensure they continue to work after upgrading.

Custom Workflow Emails

If you have customized the default Email templates for Workflow, ensure they are copied to the Site\bin\SMTP\Email Templates directory.

Step 2 - Update the Site's Meta Model

To update the meta model:

1. In Evolve Designer open your Site
2. Click the Update Meta Model button

The Model is updated with the latest required meta data.

3. Save your Site, the close and re-open Evolve Designer when prompted.

Step 3 - Update Diagram Designer layouts

1. Ensure Evolve Object Types are displayed in Object Explorer by using the **Show/Hide Object Types**button in Evolve Designer
2. In Object Explorer, view the CW Diagram Designer objects in your model
3. Edit the properties of each object and set the **Freeze Level** to '**Unfrozen**'
4. In Diagram Designer, open each layout and click the **Run** tab.

Step 4 - Update the Site settings

To update the Site settings:

1. Open the Site in Evolve Designer
2. Select the top-level **Site** node
3. Check the following settings and edit where necessary:

Setting	Description
Server Language	Choose the language of the Site if you want to override the global Evolve setting.
Server Theme	Choose the theme of the Site if you want to override the global Evolve setting.

Note: These are the basic settings required to publish your Site. For the full configuration reference, see: Configuration Reference.

4. Select the **Deployments > [server name] > Model node** (showing the Scriptname of the Model your Site is in)
5. Complete the following fields:

Setting	Description
Site URL Name	Specify the name of this Model Site as it appears in the URL, such as http://<server-name>/<evolve-IIS-site-name>/[sites|statics]/<site-url-name>/

Site Display Name	Enter the name of your site. This is only displayed on the top-level Evolve Sites page.
Deploy Custom Site	If you publish using custom content, select the custom site reference here.
Deploy Custom Site	If you publish using custom content, select the custom site reference here.
AD Group for Social Users	Only used if the Evolve Authentication Method is set to Active Directory. Specify the name of the Active Directory group you want to use for Evolve Social users.
AD Group for Contributor Users	Only used if the Evolve Authentication Method is set to Active Directory. Specify the name of the Active Directory group you want to use for Evolve Contributor users.
AD Default Social Role Name	Only used if the Evolve Authentication Method is set to Active Directory. Specify the default Role you want newly-created Evolve Social users to be given.
AD Default Contributor Role Name	Only used if the Evolve Authentication Method is set to Active Directory. Specify the default Role you want newly-created Evolve Contributor users to be given.
Display Model in Evolve	Applies to Dynamic Sites only. Use this option to specify if this Model Site is available or disabled in Evolve.

Note: These are the basic settings required to publish your Site. For the full configuration reference, see: Configuration Reference.

6. Save the Site.

The settings are updated.

Step 4 - Publish your Site

Now the Site and IIS are configured, you must publish your site so that all the required files are generated and placed in the correct location on the web server.

To publish your Site:

In Evolve Designer, click Dynamic Site or Static Site in the Publish area on the Home menu.

Accessing a Dynamic Site

Dynamic Sites are published at the following URL:

http://<server-name>/<evolve-IIS-site-name>/sites/<site-url-name>/

Accessing a Static Site

Static Sites are published at the following URL:

http://<server-name>/<evolve-IIS-site-name>/statics/<site-url-name>/

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

Installation Instructions

ℹ️ If you want to install Evolve Suite 2023.0 and Evolve 2023.0 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 2023.0:

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 Helpfor 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)**

Security

- **Basic Authentication**
- **Windows Authentication**
- **Request Filtering**

Performance Features

- **Dynamic Content Compression**
- **Static Content Compression**

Common HHTP Features:

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

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	The Username and Password of a User of the web server machine that the Evolve application can run as. This User must have Administrative rights on the web server machine. ***Note:*** *When Active Directory Authentication is used, this IIS User must be part of the domain.*	IIS 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 Evolve 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 GROUP	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 GROUP	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 GROUP	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)

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 2023.0+ & Evolve Suite 2023.0+

These instructions explain how to update your database for 2023.0.0 database.

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

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 2023.x

1. Log in to your Quest account and download Evolve Suite 2023.x

2. Install Evolve Suite 2023.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.

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 2023:

The Audit trail recording system, and Global Search system in the later versions of 2023 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

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 2023.0.0+:

Step 4 - Install Evolve 2023.0.0

1. Install Evolve 2023.0.0+, following the information detailed in the installation guide.

2. Restore any customisations that you had backed up prior to uninstalling Evolve.

Appendix H - Upgrading Coffeemaker

Upgrading from 2022.0.0 or later

After uninstalling the older version, follow these steps:

1. Restart the machine.

2. Go to C:\erwin\Evolve\Site\bin\webDesigner\custom\Marketplace\libs.

3. Delete the Custom Layout Configuration and Utils folders.

4. Go to C:\erwin\Evolve\Site\bin\webDesigner\custom\Marketplace\libs\Utils\src and check whether the "cwPdf.js" and "utils.js" files are present.

    o   If yes, then delete the Utils folder from the following location: C:\erwin\Evolve\Site\bin\webDesigner\custom\Marketplace\libs\.

    o   Else, delete these files from the following location: 'C:\erwin\Evolve\Site\bin\webDesigner\custom\Marketplace\libs\Utils\src'.

5. Go to C:\erwin\Evolve\Site\bin\webDesigner\js\external and delete the 'async' and 'ASyncLayoutLoader' folders.

6. Go to 'C:\erwin\Evolve\Site\bin\webDesigner\libs\modules' and delete 'bootstrap', 'bootstrap-select', 'docxTemplater', and 'jspdf'.

7. Go to 'C:\erwin\Evolve\Data\Common\html' and delete 'coffee', 'customDisplayStringSimulator', 'cwGrid', 'cwHtml5DiagramFilter', 'cwLayoutBackup', 'cwLayoutcwCount', 'cwWorkflow', and 'homePage' (If the html folder is empty after deleting these, then delete the html folder as well.).

8. Go to 'C:\erwin\Evolve\Site\bin\webDesigner\themes' and delete the 'theme_erwin.css', 'theme_erwin. less', 'theme_nextGen.css,' and 'theme_nextGen.less' files.

9. Install the new version.

10. Click **Update Meta Model & Themes**.

11. Click **Save**.

12. Click **Dynamic Site**.

Upgrading to 2023.0.0

After uninstalling the older version, follow these steps:
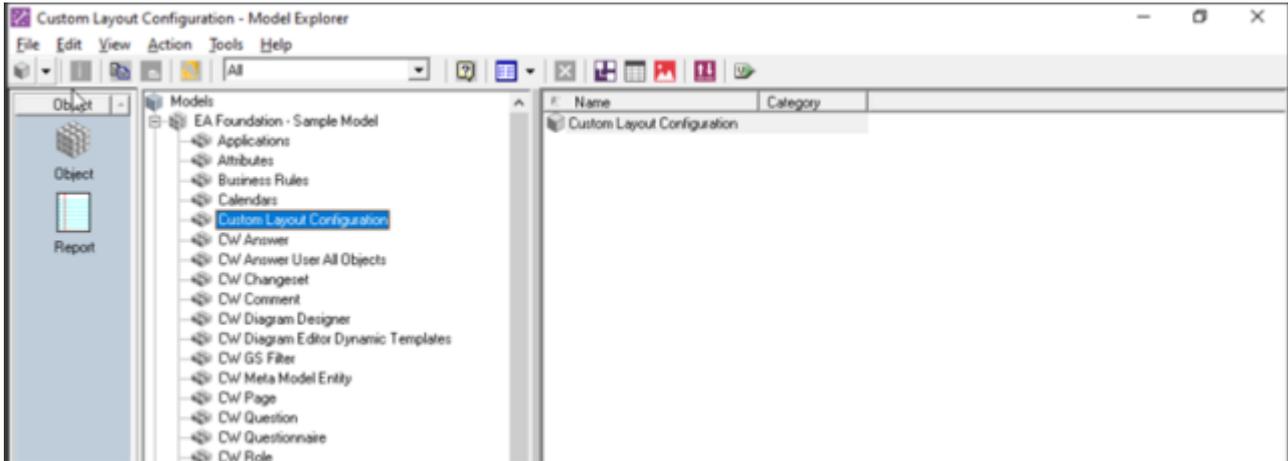
1. Restart the machine.

2. Go to C:\erwin\Evolve and delete the 'CWFileHandling' and 'CWObjectExportImport' folders.

3. Go to C:\erwin\Evolve\Site\bin\webDesigner\custom\Marketplace\libs.

4. Delete 'Custom Layout Configuration'.

5. Go to C:\erwin\Evolve\Site\bin\webDesigner\custom\Marketplace\libs\Utils\src and check whether the "cwPdf.js" and "utils.js" files are present.

    o   If yes, then delete the Utils folder from the following location: C:\erwin\Evolve\Site\bin\webDesigner\custom\Marketplace\libs\.

    o   Else, delete these files from fromt he following location: 'C:\erwin\Evolve\Site\bin\webDesigner\custom\Marketplace\libs\Utils\src'.

6. Go to 'C:\erwin\Evolve\Site\bin\webDesigner\js\external' and delete the 'async' and 'ASyncLayoutLoader', and 'tinyColors' folders.

7. Go to 'C:\erwin\Evolve\Site\bin\webDesigner\libs\modules' and delete 'bootstrap', 'bootstrap-select', 'docxTemplater', 'jspdf', and 'vis'.

8. Go to 'C:\erwin\Evolve\Data\Common\html' and delete 'coffee', 'customDisplayStringSimulator', 'cwGrid', 'cwHtml5DiagramFilter', 'cwLayoutBackup', 'cwLayoutcwCount', 'cwWorkflow', abd 'homePage' (If the html folder is empty after deleting these, then delete the html folder as well.).

9. Go to 'C:\erwin\Evolve\Site\bin\webDesigner\themes' and delete the 'theme_erwin.css', 'theme_erwin. less', 'theme_nextGen.css,' and 'theme_nextGen.less' files.

Next, to install and configure the new version, follow these steps:

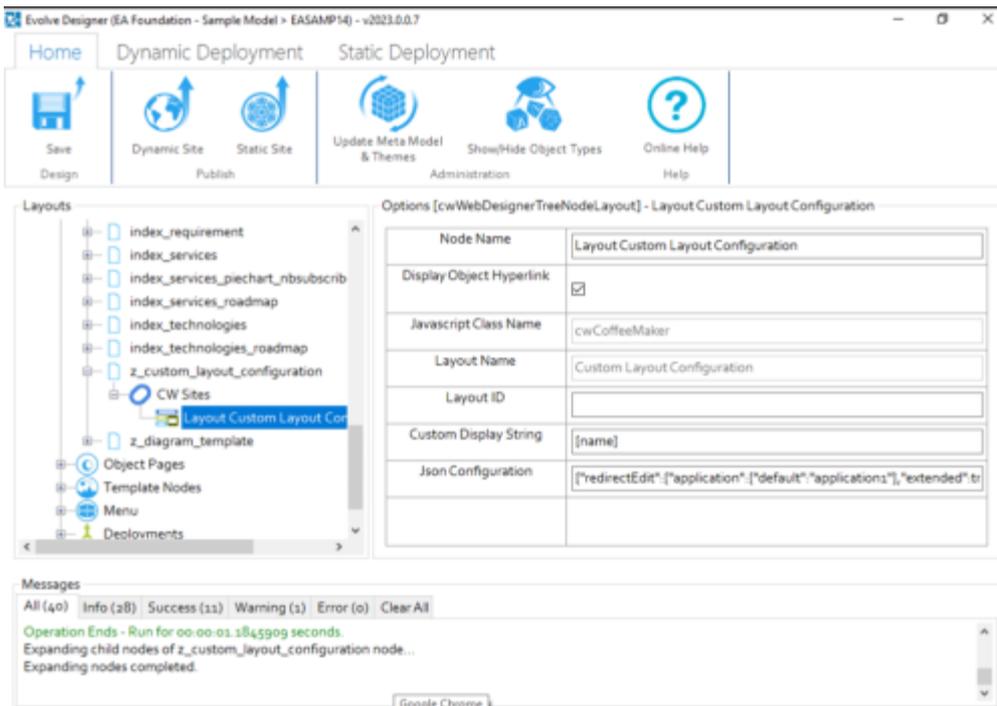1. Install new version.

2.   Start **Evolve Designer**.

3.   Click a model. For example, **EA Foundation - Sample Model**.

4.   Click **Site**.

5.   Click **Update Meta Model & Themes**.

A new object type, "Custom Layout Configuration", is created in the Model Explorer.
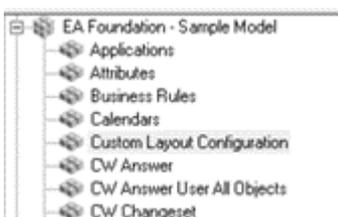

If Custom Layout Configuration is not visible in the Model Explorer, click **Show or Hide object types** in Evolve Designer. (If CW object types are already visible then hide and then unhide them.)

6.   Expand **Site** > **Index Pages** > **z_custom_layout_configuration** > **CW Sites**.

7.   Click **Layout Custom Layout Configuration**.

8.   Copy the JSON text mentioned in the Json Configuration field.

9.   Start erwin Evolve Suite and click **Model Explorer**.

10.   Expand the model. For example, **EA Foundation – Sample Model**.
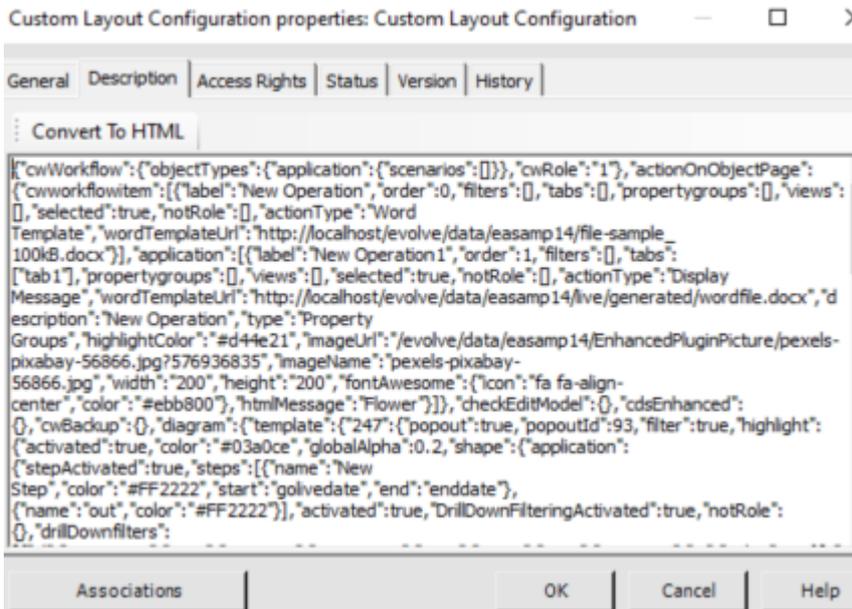
11.   Click **Custom Layout Configuration**.

Clicking Custom Layout Configuration opens an object "**Custom Layout Configuration**" in the right pane.

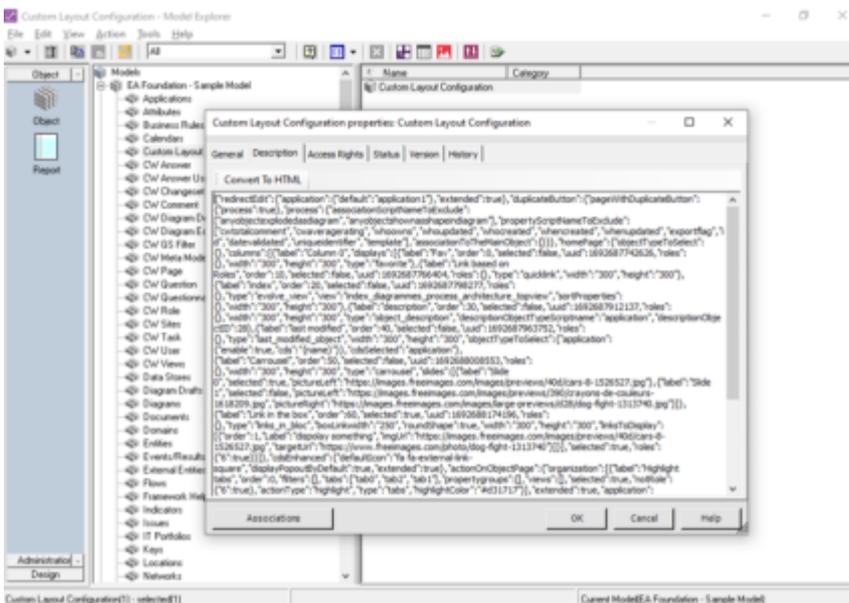12. Double-click the **Custom Layout Configuration** object.

A Custom Layout Configuration properties: Custom Layout Configuration dialog box opens.

13. Click **Description**.

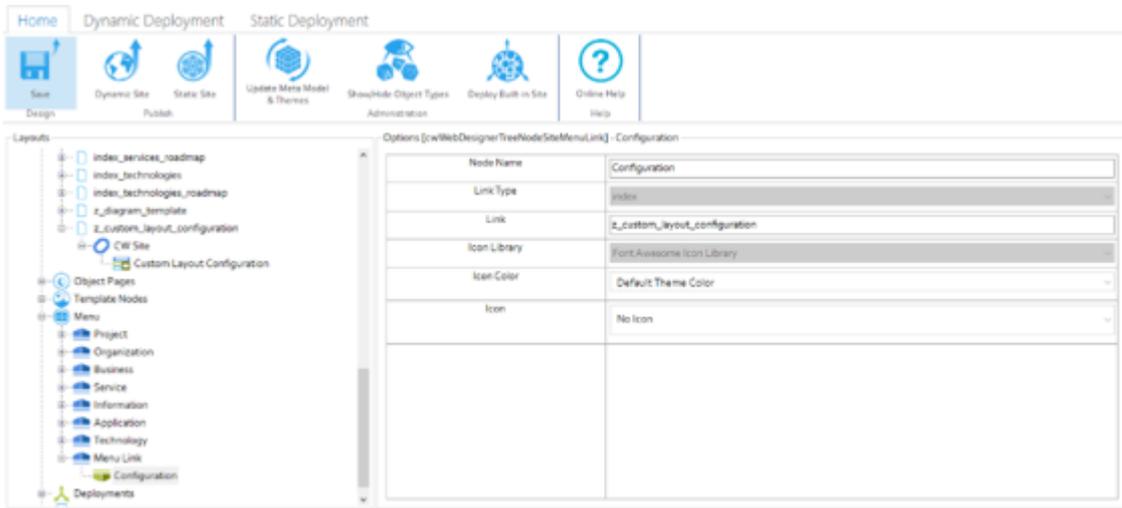14. Paste the copied JSON text in the Description field.

15. Click **OK**.

16. Restart Evolve Designer.

You can now delete the index page 'z_custom_layout_configuration'.

Before deleting this index page, ensure that you copy or take backup of the Json file.

17. Unlink the deleted index page from the Menu.

28

18. Click **Save**.

19. Click **Dynamic Site**.

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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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:

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- View how-to-videos

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- Chat with support engineers online

- View services to assist you with your product.