

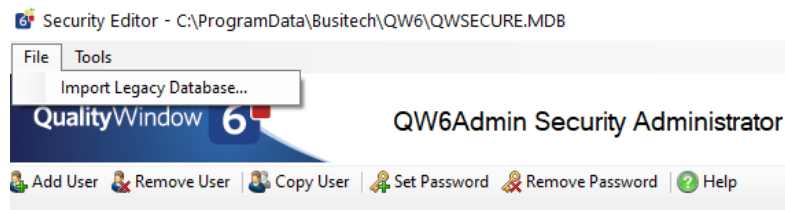
A Checklist for Upgrading to QW6

This document is designed to provide Administrators a guideline they may want to follow for understanding and proceeding with the upgrade from QW5 to QW6. It is organized in a sequence that will help you through the process.

1. Review the What's New in QW6 document to receive an overview of the differences in the two versions. See [Quality Window 6 - New Features Overview](#).
2. Download a 30-day trial of QW6 to review the features. You can install QW6 on the same workstation that is running QW5 with no conflicts. You can view existing QW5 applications using the QW6 version in read only mode. Navigate to [Download a Trial](#).
3. Review you licensing options. Here is an overview of the two options Concurrent versus Standalone licenses. Concurrent Licensing is the recommended method for QW6. Contact to review and convert existing licenses to a concurrent license. See [Understanding Concurrent Licensing in QW6](#).
4. Review the file structure environment for QW6 that you wish to use. Upgrading to a new version is a good time to resolve any issues you may encountered using QW5. Another consideration is whether to use the Directory file feature which would provide a list of QW6 applications a User would have access to. Review [Using Directory Files tutorial](#).

5. Setting up security in QW6

Note: Security Database – there is an option to Import existing QW5 user settings into the QW6 Security database. By selecting this QW6 will attempt to locate the existing QW5 Security database and then import any users that do not already exist in the QW6 Security database. A review of the imported User Id's should be performed to eliminate any Users no longer required.



For an Overview of Security see the [Managing Security tutorial](#).

For a detailed guide on QW6 Security capabilities see the [Implementing Security in QW6 guide](#).

6. Review the Shared Resource Files (QW6Admin) to insure they meet your requirements:
 - a. Units of Measure – new options added in QW6.
 - b. Statistics – setting default statistics for applications.
 - c. Control Rules – Update if you added new Rules or changed existing one.
7. Configuring the Shared Configuration Manager in QW6Admin. This tool will define the locations for the Shared Resource files as well as the Path to the configuration, the default path to the QW6

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Application files as well as the default Installation location for the QW6 software. As part of the Concurrent Licencing feature and the QWLicense Server Manager users will be directed to the correct locations for the Shared resource files making sure the correct files are in use.

Video overview: [Shared Resource Manager Tutorial](#)

Fast Track Guide: [Distributing Shared Resource files to all Workstations](#)

8. Before upgrading your QW5 application to QW6

It is important to test the Data integrity of your existing QW5 applications that could cause a problem for the upgrade process. We have a utility created to perform this task. You can find it in the QW6Admin module of QW6 and it is called QW6 Batch Check. It will scan you existing application to detect any issues with the data contained in the files and produce a report for you to review.

Video Overview: [QW6 Batch Check Utility Tutorial](#)

9. It is also a good time to review your Data Retention requirements. If your requirements are for 5 years of data and you currently have 7 years of data in your QW applications, then you should consider discarding/archiving the older data.

Note: *The QW6 Batch Check utility report does contain information about the Start and End dates as well as number of records in the file.*

We have created a Utility called QW6 Batch Move to assist you in performing this task. You can set the period you wish to retain. The older data will be moved to an archive. At the end of the process, you can decide whether to keep or discard the older archived data.

Video Overview: [QW6 Batch Move Utility Tutorial](#)

10. Upgrading QW 5 applications to QW6. This is an important part of the process and here is a link to a detailed approach to completing this task. Remember the existing QW5 applications will remain untouched and available for future review if necessary.

Important Note: Once you start recording data in QW6 applications there is no method to copy that data back to a QW5 application.

Guide to: [Upgrading Applications to QW6](#)

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11. At this point the Upgrade of the Applications is complete and you have performed the necessary testing to ensure the applications perform as expected. You should review the security settings for the applications and users one last time to verify they are correct.
12. Training users for QW6. We designed the QW6 product to be familiar to QW5 users but there are changes they need to know about. Use the [What's New in QW6](#) document to provide you with what you will include in the training of users. The [Video Tutorials and PDF Guides](#) included with QW6 are provided to assist users in understanding and maximizing their use QW6. If you have employed the use of the Alarm Summary screen in your use of QW5 then you will want to focus attention on the new [Alarm Screen](#) in QW6. It performs the same task – advising users of rule violations - but also provides for their recording of comments of users for each Alarm. You, as the Administrator will have to decide how it will be used.

Remember we are there to support you every step of the way to answer any questions or concerns.

The Busitech Team Support@Busitech.com