Qualify

Installation Guide

Original Software

Original Software

CONTENTS

Original Software

PC REQUIREMENTS

	Recommended Spec	Minimum Spec
Operating System	Windows 10	Windows 7 SP1
CPU	Quad Core	Dual Core
Memory	8 gb	4 gb
Hard Disk Speed	7200 rpm or SSD	5400 rpm
Available Hard Disk Space	50 gb	20 gb
Screen Resolution	1920 x 1080	1366 x 768

Please note that the recommended specification can vary depending on the nature of the application under test. For example, the recording of a significant number of very large web pages containing lots of data will require more memory than simpler applications.

General Requirements

- Microsoft .NET Framework Version 4.5 or higher, unless you intend to use Jira Integration in which case Version 4.5.2 is required.
- Our products are optimised for 96 pixels per inch. If you use any other setting, then you may see unpredictable results so please re-set this value to 96.

Manual Testing and Automation only

- Internet Explorer versions 9.0 to 11.0 are supported. Please see the Internet Explorer 10 and 11 pre-requisites section below if you intend to use this.
- Firefox Extended Support Releases (ESRs) which equate to versions 3.6, 10, 17, 24, 31, 38 or 45.
- Chrome version 42 and 56.
- Support for testing 64 bit applications extends to Java and Internet Explorer 10 and 11, on 64 bit Windows only. Please see the Internet Explorer 10 and 11 and 64 Bit Target Application Pre-requisites sections below.

iSeries Databses only

- V6R1 of IBM i Access for Windows or higher with the latest service pack installed. As part of the installation the '.NET Data Provider' is a requirement. This can be installed from the IBM i Access for Windows CD under the 'Data Access' component.

Original Software

Internet Explorer 10 and 11 Pre-requisites

There are some pre-requisites regarding some Internet Explorer configuration options which must be adhered to in order for record and playback support for IE10 and 11 when used on Windows 8 or above to work.

By default, IE10 and IE11 run in a multi process mode. The outer window runs in one process and the contents of each tab runs in its own process. The outer process runs as a 64 bit process and the child processes each run as 32 bit. If this mode is changed then TestDrive will be unable to work with IE10 or 11. The "Enable Enhanced Protected Mode" option shown below forces all the child processes to run as 64 bit, we therefore need this switched off.

64 Bit Target Application Pre-requisites

Please install the following component from the DVD image if you are testing a 64 bit application, including IE 10 or 11. If you attempt to install and this is already present on your computer then the installation can be cancelled.

\Third Party Components\Visual C++ 2017 Runtime\vc_redist.x64.exe

Original Software

INSTALLS AND UPGRADES

All products (apart from Qualify Web) are included in the Qualify installation and will all be installed or upgraded.

First Time Installations

If this is the first time that you are installing this software, either on a new PC or for the first time at your company, please follow the instructions in this section.
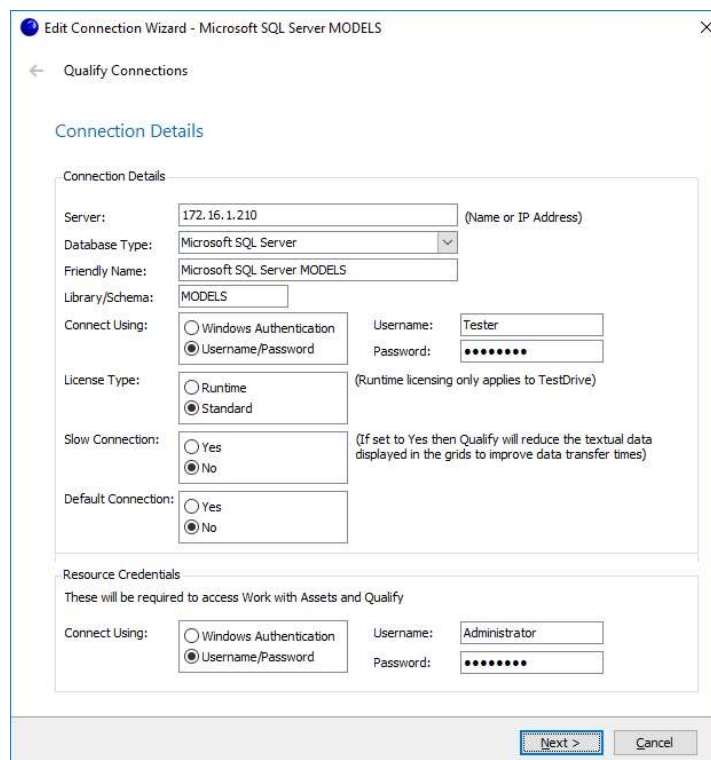
1. Either insert the DVD and run the Original Software Setup.msi in the folder D:\Qualify where D is the DVD drive, or follow the instructions to Install or Upgrade from the DVD autorun.

2. Start Qualify (from your programs menu beneath Original Software).

3. The following screen is displayed to enable a connection to the database to be created. If this is the first time you have installed the software at your company, or you are setting it up on a new server, the database must be installed by a System Administrator. If you are using either **SQL Server or Oracle**, select the option to install the database from the screen below. Please see the following Database Installer section for more information.

    If you are connected to an **iSeries** database then the database installation must be run directly from the server, please refer to the Installation Guide in the 'TBench' folder on the DVD for full instructions.

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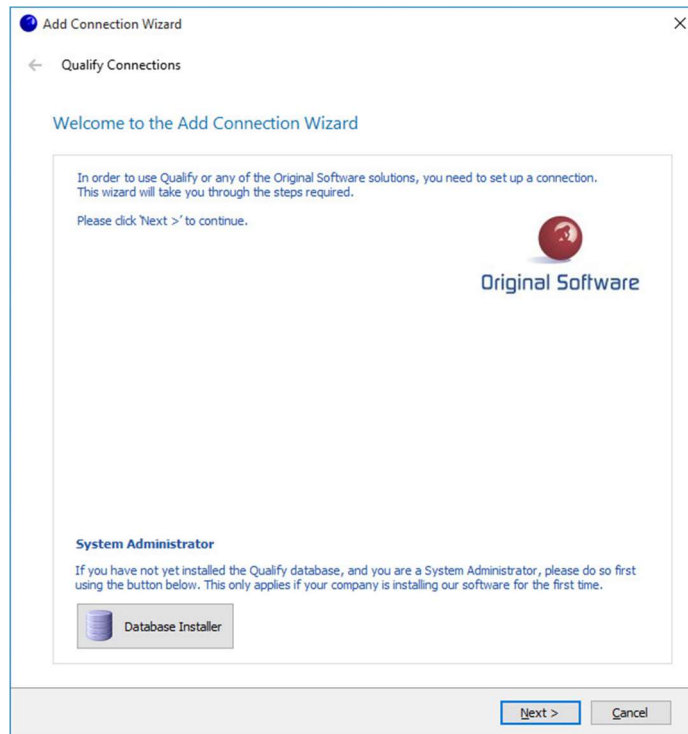
4. Create a Connection to the database by clicking Next (or if you have just used the Database Installer by clicking the button above then you will be automatically taken to the Connection wizard).

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Server	Key in the name of the server or its IP address. Server type can be SQL Server, Oracle or iSeries.
Friendly name	A more descriptive name by which this connection will be referred.
Library/Schema	If using the IBM iSeries as the server this is the library in which the TestBench application is stored and should be left as the default TB_xPO. For SQL and Oracle this is the name of the Qualify database.
Connect Using	Determines whether Windows Authentication or User Name and Password will be used to log on to the server. See specific section for more information.
Username/Password	The User ID and Password that will be used as the default for all server connections, provided Windows Authentication has not been selected. If it has been selected then these fields can be left blank. The User ID and Password are optional fields and should be entered if your database requires it.
License Type	The default mode in which scripts will be executed when using this connection. Select from Standard, where all functionality is available, or Runtime, where functionality is restricted and many maintenance options are unavailable.
Slow Connection	If you are connected to the server on a very slow connection, there are several areas throughout the product where, for performance reasons, functionality is conditioned on this option.
Default Connection	A connection with this option enabled will always be used in preference to one without it set for the same server/library, when checking permissions against TestDrive Assets. So if you have two connections, each referencing a different User ID, the default one will always be used when checking permissions on Scripts, Playlists, Variable Data and Worklists.
Resource Credentials	Optionally key in the User Name and Password which is set up within the Resource area. If one or both of these properties is left blank, they must be provided on the Login screen.

When Qualify is installed for the first time on a server, Administrator is the only pre-existing User ID. Enter Administrator into the User ID field and 'password' into the Password field. The next time you use this connection you will be immediately forced to change the password for the Administrator (all passwords must be between 1 and 20 characters long and can only contain the following characters: alpha-numeric, underscores, hyphens and apostrophes).

Once all fields have been keyed, click Next. If any errors exist, a red exclamation mark is displayed next to the field. Hover over this icon to view the error details. Click Next again on the 'Plug-in Credentials' screen.

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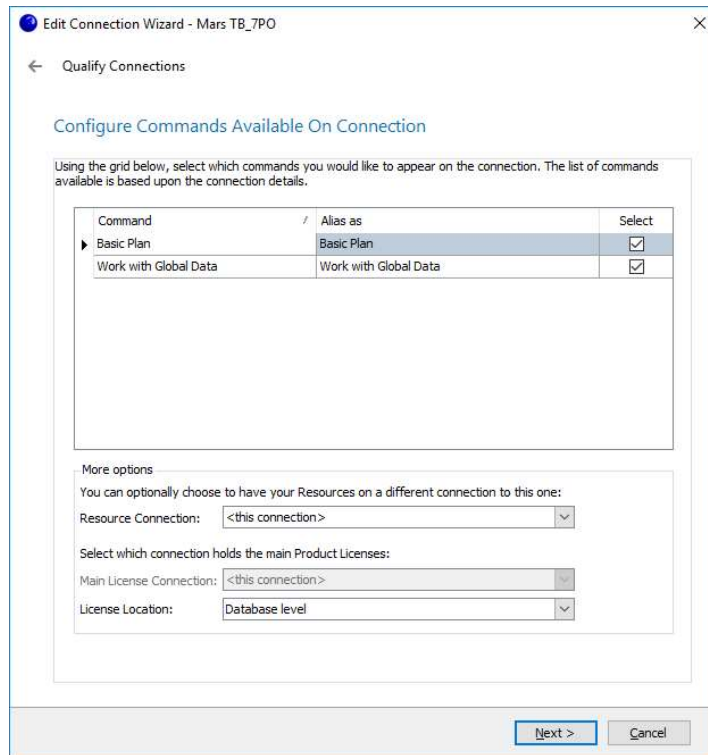
Resource Connection   If Qualify has been installed on more than one server or library/schema, this option can be used to centralise resource information. Choose one connection from which all resource data such as passwords will be retrieved.

Main License Connection   This option becomes enabled when a super-concurrent license exists. Select the connection which holds the main product licenses to be accessed by all servers.

License Location   Specify where Qualify should look for the license. By default, all connections are set to "Database level" but can be changed to "Library Level", this might be important if you have more than one Qualify database being used by distinct groups of users who do not wish to share licenses. A specific library level license will need to be issued to you in order to support this.

Click Next to complete the creation of the connection and display the login screen.

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Upgrades

Please ensure that you have read the **Release Notes** for the version you are installing, these are available from the Qualify folder on the DVD or from your support contact.

1. It is **essential** that you take a backup of your database prior to performing an upgrade as changes will be made to the database structure which cannot be undone.

2. Either insert the DVD and run the Original Software Setup.msi in the folder D:\Qualify where D is the DVD drive, or follow the instructions to Install or Upgrade from the DVD autorun.

3. Start Qualify (from your programs menu beneath Original Software).

4. If a database upgrade is required, the following screen will be displayed. This is sometimes required for major new releases and will be indicated in the Release Notes. The database upgrade needs to be run once only by a System Administrator. If you are using either **SQL Server or Oracle**, there is an option to upgrade the database. Select 'Yes' to begin the Database Installer process, please see the following Database Installer section for more information. If you select 'No' then you will be reverted to the login screen and will not be able to continue to use the new Client software until the database upgrade is run.

    If you are connected to an **iSeries** database then the upgrade must be run directly from the server, please refer to the Installation Guide in the 'TBench' folder on the DVD for full instructions.

    PLEASE NOTE – It is essential that you have taken a backup of your database prior to performing any database upgrade.
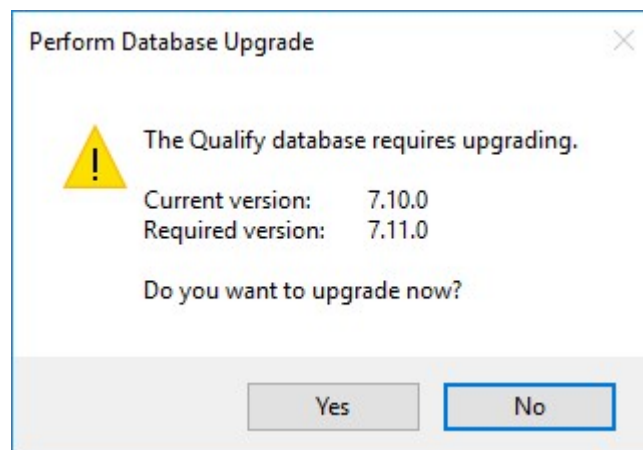
5. If a database conversion is required, the following screen will be displayed. This is sometimes required for major new releases and will be indicated in the Release Notes. The database conversion needs to be run once only by a System Administrator and applies to all server types; SQL Server, Oracle and iSeries. Select 'Yes' to begin the conversion process, if you select 'No' then you will be reverted to the login screen and will not be able to continue to use the new Client software until the conversion is run.

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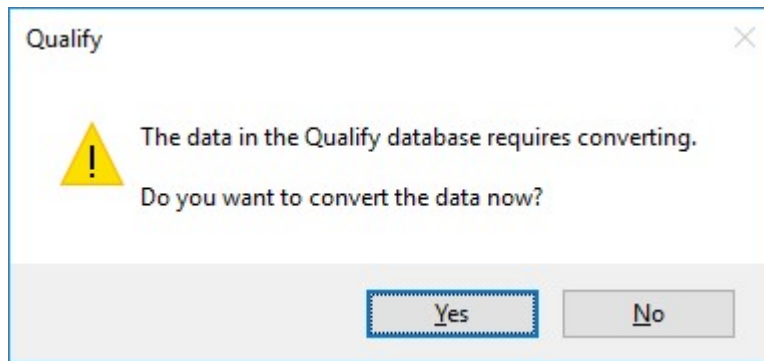
Once you click 'Yes' the following screen is displayed. Click OK to continue with the conversion.
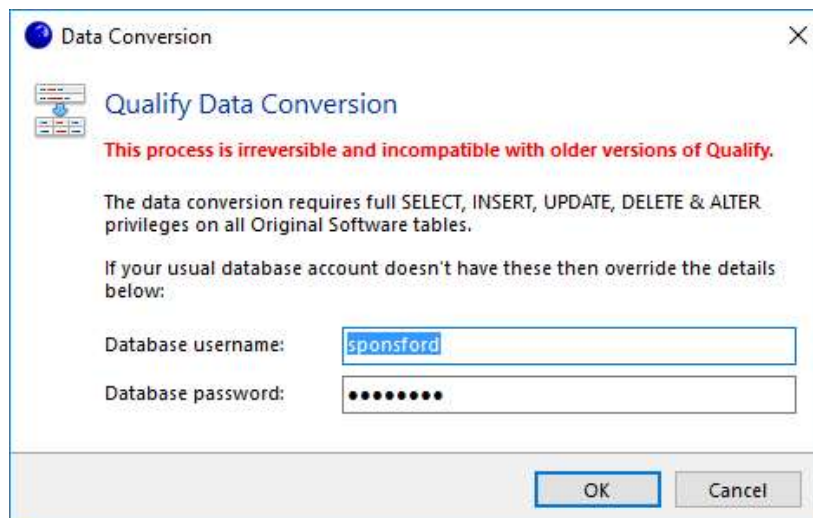
Database Installer

If you are installing for the first time and need to create a new database, or your database requires upgrading, please follow these instructions when you are prompted to install a new database. If you need to install a new database for any reason and you have not been prompted to do so, you will find the program in your client software install location (typically starting C:\Program Files (x86)\Original Software\Build nnnn), it is called OriginalSoftware.DatabaseInstaller.exe.

Note: If upgrading it is advised that you back up the TB_7PO and OSLICENSE databases before running the configurator as not all changes made can be rolled back in the event of a failure.

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- Key in the name or IP address of the server.
- If your database is not called TB_7PO, specify the alternative name (maximum of 10 characters).
- For Oracle users only, you can optionally specify your own database password that conforms to your password standards.
- Choose how to connect to the database, either using Windows Authentication or using a Database Login account. If choosing the Database Login Account then both a username and password are required (the configurator does not support blank passwords). **Please note: The account used must have Database Administrator privileges. For new installs the user needs the 'CREATE DATABASE' permission. For upgrades the user needs the db_owner role so they can make any edits to that database.**
- The default timeout interval for running a command is 120 seconds, this can be extended here if your upgrade requires a longer timeout due to slow server performance.
- Click the Next button to take you to the permissions check step.

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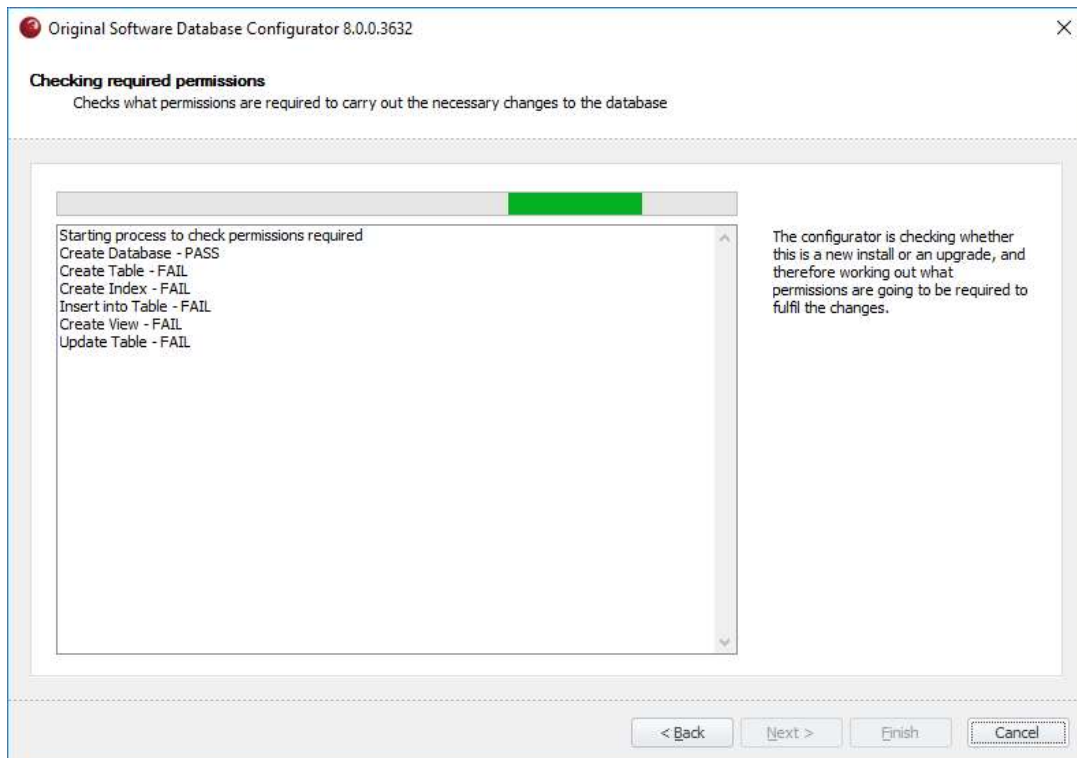
The necessary permissions required for carrying out the configuration of the databases will be checked for the user provided in the previous step. If any required permissions are not granted for the user, then the configurator will stop on this screen and show you a list of the permissions required and which ones the user has and which ones they do not have. If the user account has all the necessary permissions then the configurator will automatically move on to the next step.

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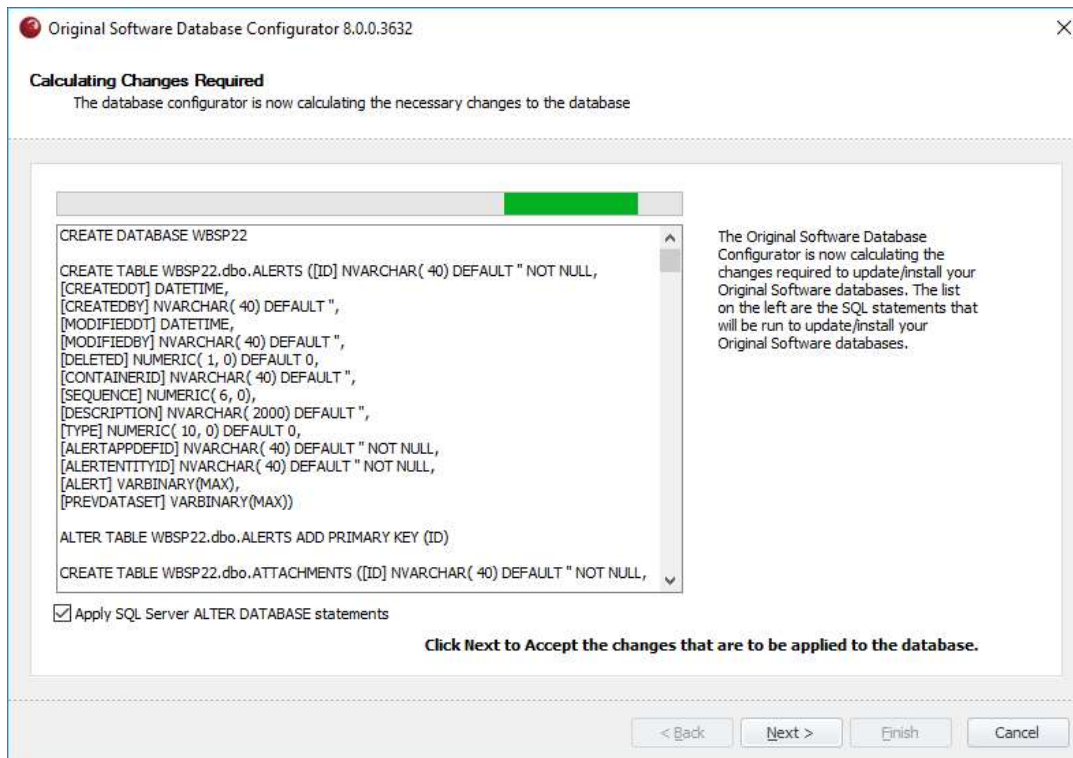
A screen is displayed which shows what steps will form the execution. It is not possible to simply copy these statements and manually execute them, the database configurator must be used. On SQL Server only you can optionally run two ALTER DATABASE statements, this option is on by default and we strongly recommend it is left on to avoid any record locking issues. The two commands that will be run are:

ALTER DATABASE TB_7PO SET ALLOW_SNAPSHOT_ISOLATION ON

ALTER DATABASE TB_7PO SET READ_COMMITTED_SNAPSHOT ON

Click Next to apply all of the statements.

While the progress bar is moving the Qualify databases are being configured. The Cancel button can be clicked while the databases are being installed, on SQL Server this will roll back any changes that have been made, however on Oracle this will not roll back any table creation or updates therefore the databases will need to be rolled back manually. If any failure occurs while creating the databases the installation will stop straight away and a list of the commands executed will be displayed on the screen along with the command that failed. On SQL Server any changes that have been made will be rolled back, however on Oracle the changes will not be rolled back therefore the databases will need to be rolled back manually before running the configurator again or attempting to manually configure the database. If all the commands are executed successfully the configurator will automatically move to the next step.

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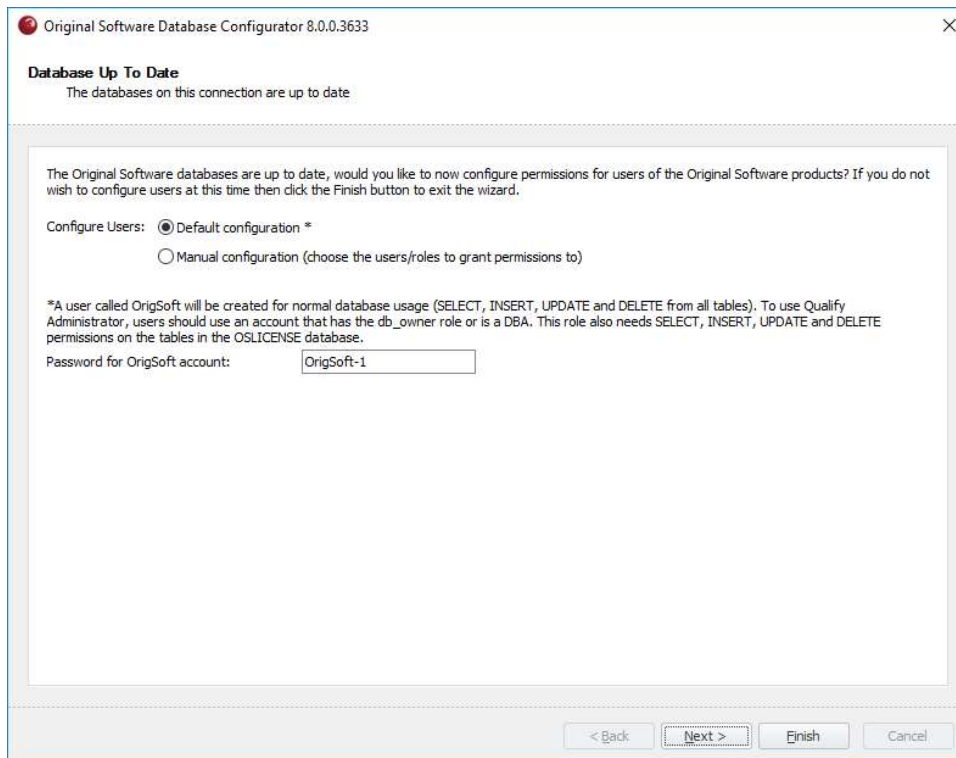
- The Database Configurator provides the option to configure the security for the databases that have been created. If you do not wish to configure the security of the databases then the Finish button can be clicked on this screen and the configurator will close down. You can run the configurator again in the future and it will take you through to this step so that permissions can be configured then.
- The previous steps will have created one role called OriginalSoftware and the 'Default Configuration' option will also create a user for normal database usage.
- To use Qualify Administration, an additional account which has db_owner privileges must be created, this role also needs SELECT, INSERT, UPDATE and DELETE permissions on the OSLICENSE database.
- The Manual configuration option allows the choice of which users, roles and database logins to grant permissions for.
- A final option which allows CREATE TABLE rather than CREATE ANY TABLE permissions to be granted relates to Oracle databases only and will not appear for SQL Server installations.
- To configure the permissions select either the Default configuration or Manual configuration and then click the Next button.
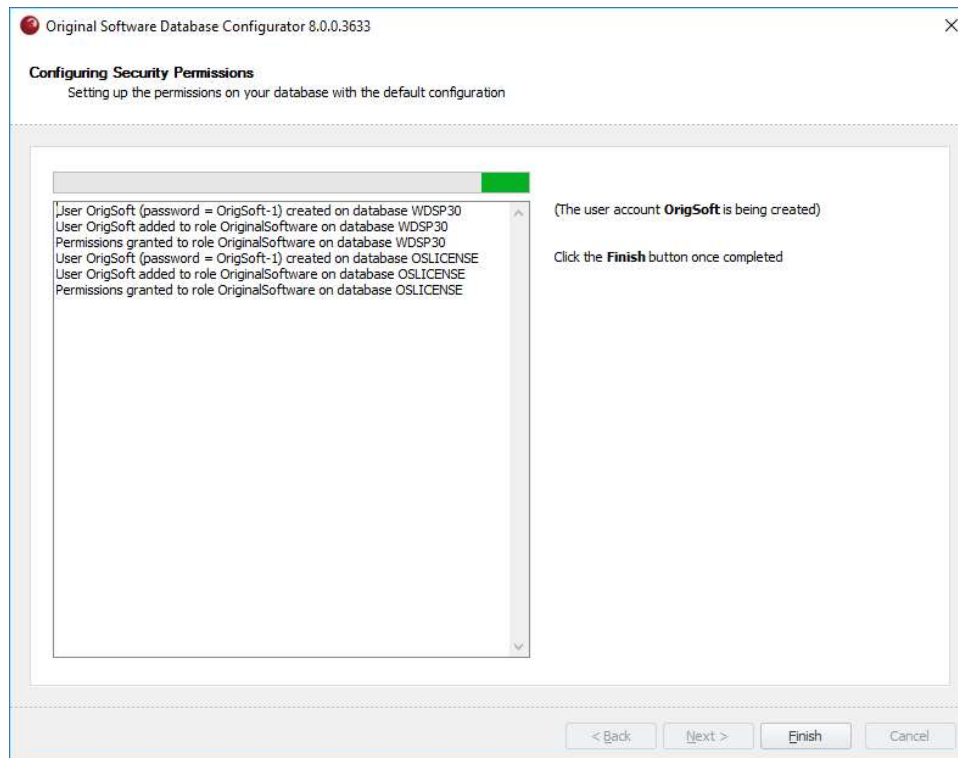
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Automatic Permissions Configuration (shown above):

- The role and user will be created (unless they already exist).
- The OriginalSoftware role will be granted SELECT, INSERT, UPDATE and DELETE permissions on all of the tables within the Qualify databases, including OSLICENSE.
- The screen shows which of the previous steps was successful and which were not. Once completed the Finish button becomes available and the configurator can be closed down (please note the progress bar may continue to move).

Manual Permissions Configuration:

- When selecting the manual permissions option, a screen is shown allowing the selection of the Users, Roles and Database Logins to grant permissions for.
- Use the permission type column to select either Normal User or Qualify Admin, if required.
- Database Logins are the account which is used to access the database (these are only available on SQL Server).
- Users are the mechanism of accessing the tables, views etc on the database.
- Roles are a way of grouping users together and granting permissions once.
- At least one User, Role or Database Login must be selected in order to proceed at which point the Next button becomes available and should be clicked in order to grant the selected User/Role/Login the required permissions.

- The final screen shows the permissions that have been granted and which ones failed to be granted to the selected users, roles and database logins from the previous step.
- If a Database Login was selected (only on SQL Server), a corresponding user is created (unless already existing) on each of the Qualify databases.

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- The permissions for Normal User will be SELECT, INSERT, UPDATE and DELETE on all tables in the Qualify databases, including OSLICENSE. The permissions for Qualify Admin are in addition CREATE ANY TABLE / CREATE TABLE, CREATE ANY INDEX, ALTER ANY TABLE, DROP ANY TABLE and DROP ANY INDEX permissions as well so that Qualify can be used. These additional permissions are not required on the OSLICENSE database.
- The Back button can be clicked to return to the previous screen so that different users/roles/logins can be selected.
- Once the permissions have been configured the Finish button will become available, clicking on which will close the configurator.

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PRODUCT VALIDATION

A validation code is required for new installations. In order to provide a validation code we will need to know the IP address for the iSeries, SQL Server or Oracle database server. To obtain this information, click on the Licenses option on the Administration menu in Qualify. The following screen is displayed which shows the products that have been registered with a validation code.

Right-click on the table and select the Server Details option, this will display a dialog with the server details including the IP address. Send your supplier this IP address and they will send you a license file which you can double click to import or you can click on the "Import Licenses" button and choose the license file. This is required in addition to the code entered on the iSeries if this is the database that you are using.

If you run Qualify and you have not installed any validation codes, you will not be able to record any Scripts or view any existing Scripts or Screen results.

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