

Upgrade Guide

QuickAddress Pro Web

Version 6.0

QAS Ltd.

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1. Introduction

Important:

Due to a change in architecture, this version of Pro Web is not binary compatible with version 4.0x or earlier. Such integrations must be re-worked to use the new XML/SOAP interface. See section 6 for more information about this and other compatibility issues.

This document is intended to be used in conjunction with the main product manual (*QuickAddress Pro Web Integration Guide*) to assist in upgrading from an earlier version of Pro Web.

Firstly, you should check which version you are upgrading from. This document contains information on upgrading from the following versions:

- QuickAddress Pro Web – versions 5.x
- QuickAddress Pro Web – version 4.5x
- QuickAddress Pro for the Web – version 4.0x
- QuickAddress Pro for the Web (World Version) – version 3.5x
- QuickAddress Pro for the Web (World Version) – version 3.0x
- QuickAddress Pro for the Web (World Version) – version 2.3x
- QuickAddress Pro for the Web (World Version) – version 2.1x

If you are upgrading from any version other than those listed above then it is necessary that you start afresh and carry out a full re-integration and configuration of the product without reference to your previous installation.

If you are upgrading from the UK version product range then there is a utility available that will help convert your previously defined address layouts into the new format. See “Appendix B: Utilities” in the *QuickAddress Pro Web Installation and Administration Guide* for details about the UK Layout Migration Utility.

If you experience problems and are unable to find help in either this document or the main product manual then please check the QAS support website at:

<http://support.qas.com/>

If you are still unable to resolve the issue then please contact QAS Technical Support, either by telephone or e-mail. Contact details can be found at the front of the product manuals or on the QAS support website.

2. New Features

This section provides a brief overview of the key features introduced into this and recent versions of QuickAddress Pro Web. Further information relating to these features can be found in the accompanying product manuals

2.1 Version 6.0

- Support for UK Land and Property Gazetteers, such as the NLPG.
- Support for UK gas and electricity meter number data.
- Support for Royal Mail's Not Yet Built dataset (UK addresses currently under construction).
- Support for New Zealand address verification.
- Introduction of the Keyfinder engine, to retrieve addresses using an associated unique identifier (such as a gas meter number).
- Ability to search concurrently on multiple datasets for a country – for example, consumer names and business names.
- Added bulk verification to verify multiple addresses in one transaction.
- Improved (HTML-based) help system.
- C# integration code updated to be Microsoft .NET 2.0 compatible (from .NET 1.1).
- JSP integration code no longer dependant on Apache Axis.
- Product is Vista compatible.

2.2 Version 5.0

- Support for US consumer names data.
- New address verification engine for the US offering improved matching capabilities. This is now available on all supported platforms (previously only available on Windows).
- Address verification for French premises-level data set (FRP).
- Support for New Zealand address data (not verification engine).
- Rapid addressing on the Intranet. Introduces support for the Typedown engine and the ability for picklists to dynamically update as the operator types.
- ActiveX Control. Easy-to-integrate Windows component that provides operators with a rich user interface.
- Integration code for Perl.
- C API interface. This is useful for environments and languages that do not provide native support for XML/SOAP. A platform-independent test harness is also provided.

2.3 Version 4.5

- Support for UK consumer names data (edited/enhanced Electoral Register).
- Support for XML/SOAP. The previous "thick-client" model is no longer supported, requiring a full re-integration of the software.
- Address verification on the Web. Suitable for websites where users enter their full address.
- Address capture on the Intranet. Suitable for trained operators who want to capture addresses as quickly as possible.
- Integration code for Java/JSP, PHP, VB.NET, C#.NET, and ActiveX/ASP.

- Support for per-click (pay-per-lookup) pricing.
- Email notification to warn of imminent data and licence expiry.
- Ability to return UK PNR localities and other “submitted” address elements. These are elements that can only be returned in the final address if searched upon by the user.
- AMAS 2005 certification (Australia).

2.4 Version 4.0

- Support for UK business data and many UK DataPlus sets.
- Support for Irish address data.
- Support for USA County codes DataPlus set. This is supplied for free alongside the USA address data.
- Improved searching and scoring of premises and sub-premises information.
- Enhanced scoring of similar looking characters; e.g. zero and letter o.
- Barcode support for UK and the Netherlands.
- Introduction of Licence Management. This requires activation keys for each data set that has been purchased.
- AMAS 2004 certification (Australia only).

2.5 Version 3.5

- Support for French premises-level address data.
- Support for Singapore sub-premises level address data.
- USA premise, street and sub-premise information entered as one line of text (instead of three separate pieces of information).

2.6 Version 3.0

- Support for Client/Server configurations. This requires the additional purchase of a QuickAddress Pro Server.
- AMAS 2003 certification (Australia only).

3. Upgrade Instructions – Version 5.x

Note:

It is strongly recommended that the new version of the product is installed and tested in a safe environment prior to deployment on a live system.

Because Pro Web 6.0 introduces support for searching on multiple datasets concurrently, there has been a change to the settings in the **qawserve.ini** file.

The *InstalledCountries* setting has now been replaced by the combination of the two settings *InstalledData* and *DataMappings*.

See the *Configuration Settings* section in the *QuickAddress Pro Web Installation and Administration Guide* for information relating to the purpose and format of configuration files as well as detailed information about the new settings.

4. Upgrade Instructions – Version 4.5x

Note:

It is strongly recommended that the new version of the product is installed and tested in a safe environment prior to deployment on a live system.

Support for XML/SOAP was introduced in version 4.5. If you are upgrading from a version earlier than this then you must follow the instructions in section 5.

To install the new version of software:

1. If you wish to run an old version of the QuickAddress Server simultaneously then make a note of the port number that it uses. You will need to pick a different port number for the new installation.
2. Follow the installation instructions in the *QuickAddress Pro Web Installation and Administration Guide*. Make sure you install the software alongside any previous installations of the product (rather than overwriting them).
3. Copy the following configuration files from the previous installation, overwriting the default copies of files that have just been installed. This will copy across details of the installed datasets and configured address layouts.
 - a. qawserve.ini
 - b. qalinc.ini
4. Edit the qawserve.ini configuration file and locate the ServerAddress setting. Update this if it does not specify the correct port number for the new server. For more information, see the Configuration Settings chapter in the *QuickAddress Pro Web Installation and Administration Guide*.
5. Repeat step 4 in the qaworld.ini configuration file. This ensures the supporting utilities such as the Configuration Editor, Administrator Console and test harness know the correct IP address and port number of the server.
6. Run the test harness to verify that the installation was successful. See the *Testing Your Installation* section in the *QuickAddress Pro Web Installation and Administration Guide* for details on how to do this.
7. If you have used a different IP address and/or port number for the server then you will need to modify your existing integration code to reflect this.
8. Review and act upon any other compatibility issues as highlighted in section 6.

The previous installation of the software should only be uninstalled once you are happy that the new version is performing as expected.

5. Upgrade Instructions – Version 4.0x and earlier

Note:

It is strongly recommended that the new version of the product is installed and tested in a safe environment prior to deployment on a live system.

The architecture of Pro Web has changed since version 4.0x. To migrate the configuration settings from a previous installation it is necessary to manually edit the application configuration files.

To install the new version of software:

1. Follow the installation instructions in the *QuickAddress Pro Web Installation and Administration Guide*. Make sure you install the software alongside any previous installations of the product (rather than overwriting them).
2. Rename the file **qaworld.ini** in the new installation to **qaworld.def**. This is to retain a copy of the default client-side configuration settings. These are used by the Configuration Editor, Administrator Console and Command Line Management utilities.
3. Copy across the file **qaworld.ini** from the previous installation. If you were using a Client/Server configuration then you will find this with the client-side program files.
4. Rename the file **qawserve.ini** in the new installation to **qawserve.def**. This is to retain a copy of the default server-side configuration settings. These are used by the QuickAddress Server.
5. Copy across the file **qawserve.ini** from the previous installation. If you were using a Client/Server configuration then you will find this with the server-side program files.
6. Copy across the file **qalicsn.ini** from the previous installation, overwriting the default version in the new installation. If you are upgrading from version 3.5 or earlier then this file will not exist and you will need to use the supplied licence keys to activate your installed data sets. See the *Licences* section in the *QuickAddress Pro Web Installation and Administration Guide* for more information.
7. Migrate your configuration settings from **qaworld.ini** to **qawserve.ini**. See section 5.1.1 for details on how to achieve this.
8. Delete **qaworld.ini** and then rename **qaworld.def** to **qaworld.ini**. This is to restore the configuration settings for the Configuration Editor, Administrator Console and Command Line Management utilities.
9. Update the configuration settings held in **qawserve.ini** to ensure that Pro Web is correctly configured and that any new functionality is enabled. See section 5.1.2 for more information.
10. Run the test harness to verify that the installation was successful. See the *Testing Your Installation* section in the product manual for details on how to do this.
11. Use the new integration code to re-integrate Pro Web into your web application. Due to the change in architecture it is not possible for the new version of Pro Web to work with existing integrations. See section 6.2 for more details.
12. Review and act upon any other compatibility issues as highlighted in section 6.

The previous installation of the software should only be uninstalled once you are happy that the new version is performing as expected.

5.1 Configuration Settings

See the *Configuration Settings* section in the product manual for information relating to the purpose and format of configuration files.

5.1.1 QAWORLD Settings

Previous versions of Pro Web stored certain configuration settings in the file **qaworld.ini**. Due to a change in the architecture of the product, these are now stored in **qawserve.ini**. This table lists the individual settings and details the action that should be taken with each one in order to migrate them across.

All settings should appear in the [QADefault] section of the configuration file.

Setting	Action
Language={integer}	These settings can be moved across to qawserve.ini without any modification.
UseDataLanguage={boolean}	
SystemPrefix={text string}	
TimeoutOldDataset={integer}	
UnmatchedTextFormat={text string}	
MultiElementLabels={boolean}	
SearchTimeout={integer}	This setting has been renamed to EngineTimeout.
SearchMaxMatches={integer}	This setting has been renamed to SLMaxMatches.
SLMinDist={integer}	These have been superseded by the EngineIntensity setting. See the "Configuration Settings" section of the <i>QuickAddress Pro Web Installation and Administration Guide</i> for more details.
SLMaxDist={integer}	
USASubPremDesc={list of descriptors}	These settings were only used for version 3.5, as they are now held internally within the data files. They do not need to be copied across to qawserve.ini.
USAStrreetDesc={list of descriptors}	
TimeoutGrab={integer}	These settings are now redundant due to the new architecture of Pro Web. They do not need to be copied across to qawserve.ini.
ShutdownIfInactive={boolean}	
OemCharacterSet={text string}	
DataWarning={integer}	
LogFile={filename}	These settings are only required for troubleshooting purposes and as such can be ignored.
LogErrors={boolean}	
Files={integer}	This setting is only required if the operating system limits the number of files that can be opened concurrently. If defined then ensure that this setting appears in qawserve.ini and that it is at least as high as the number originally specified.
ServerAddress=QATCPIP:{IP address}:{port}	This setting should only have been defined if running in a Client/Server configuration. See section 5.1.2 for more information relating to this setting.

5.1.2 QAWSERVE Settings

This section details any action that is to be taken with the settings held in the **qawserve.ini** configuration file. It is assumed that you have copied across this file from your previous installation and retained the default installation settings in the **qawserve.def** backup file.

All settings should appear in the [QADefault] section of the configuration file unless otherwise specified.

Setting	Action
ServerAddress=QATCPIP:{IP address}:{port}	Ensure these settings define the correct IP address and port for the newly installed server. For Windows installations, this information should have been written to qawserve.def. See the <i>QuickAddress Pro Web Installation and Administration Guide</i> for more information about configuring servers.
ServerWsdlUrn=http://{IP address}:{port}/	

Setting	Action
ServerComment={string defining server name}	If previously using a Client/Server configuration then this should already be set. For Windows installations, this information should also have been written to qawserve.def.
ForceAcceptOnStepin={boolean}	These are new settings and should be copied across from qawserve.def to ensure that the product is initially configured for standard (out-of-the-box) behaviour.
NoMatchesMessage={text string}	
VerifyInputRetain={boolean}	
CacheLevel={string value}	
AUSCertification={boolean}	
[USAVerifyRestrictions] InputLineCount={integer} InputLine1={string} ...	This section and the settings contained within need to be defined if performing USA address verification. Suitable defaults can be found in qawserve.def.
NotifyDataWarning={integer}	These settings are only required if enabling the ability to send emails to an administrator when data, licences or per-click meters are about to expire. See the <i>QuickAddress Pro Web Installation and Administration Guide</i> for more information.
NotifyLicenceWarning={integer}	
NotifyMeterWarning={integer}	
MailServer={IP address}	
AdminEmail={email address}	
ServerEmail={email address}	

6. Compatibility Issues

This section highlights any compatibility issues that should be considered to ensure the newly installed product behaves as expected.

6.1 US Address Verification Engine

This version introduces a new address verification engine for the United States, which offers improved matching capabilities. This replaces the United States Postal Service (USPS) Address Matching System (AMS), which was supplied on a separate CD. If you had previously installed the USPS AMS then there will be a number of data files that are no longer required. The following instructions explain how to remove these:

1. In the qawserve.ini configuration file, locate the USPSDataLoc setting and note the path to the folder.
2. Use file explorer (or similar) to view the contents of the specified folder.
3. Delete the following files:

3553proc.dat	ctystate.ndx	zip5fle.dat
3553ver.dat	zadrfile.dat	zip5fle.ndx
ctystate.dat	zadrfile.ndx	zxrefdtl.dat

and:

MMYYYY.ver (where MMM = month, YYYY = year)

4. The USPSDataLoc setting is no longer required and can be deleted from the qawserve.ini configuration file.

6.2 Stepping into USA Ranges

Version 5.0 introduced the ability to step into USA ranges (only applies to the Intranet scenarios). The resulting picklist contains details of all addresses that are *known* to physically exist, although it does not contain *all* addresses, as other potential addresses have not been verified. This functionality helps reduce the overall size of picklists as well as simplifies the navigation and selection of addresses. See the *USA Data Guide* for more information.

This behaviour applies both to the US postal address dataset (supplied by USPS) and the Names data set (supplied by Experian). To enable this functionality:

1. Edit the qawserve.ini configuration file.
2. Add the following settings:
 USAPremiseUnderUnexpandableRange=Yes
 USNPremiseUnderUnexpandableRange=Yes

6.3 Integration Code

Note:

This only applies if upgrading from version 4.0 or earlier.

Version 4.0 and earlier relied on a “thick-client” architecture, which was integrated using either an ActiveX or Java interface. The latest version of Pro Web is very different as it is based around the XML/SOAP standard. This makes it very difficult to re-work any existing integrations of Pro Web. It is therefore recommended that you perform a full re-integration based on the new integration code that is supplied as standard with the product.

This also gives you the opportunity to re-evaluate the functionality that you wish to provide to the end user. The new version of Pro Web supports three different scenarios whereas previously there was only one. These are Address Capture on the Web (replicating previous functionality), Address Verification on the Web, and Rapid Addressing on the Intranet.

See the product documentation for a full description of the differing scenarios and instructions on how to use the integration code.

6.4 UK Postally Not-Required Localities (PNRLs)

Note:

This only applies if upgrading from version 4.0 or earlier.

PNRLs are locality names that are not actually required for the delivery of mail and can therefore be omitted if required. From version 4.5 onwards these are now returned by default in the final address if the user had searched upon them.

To revert to previous behaviour:

1. Run the Configuration Editor and select the layout being used to format UK addresses.
2. Use the Auto Formatting dialog to deselect the *Submitted PNR locality* element.

6.5 Formatting of UK Organisations and Departments

Note:

This only applies if upgrading from version 3.5 or earlier.

The default formatting rules for organisations and departments were changed for version 4.0. To conform to the Royal Mail postal guidelines, this was updated so that department information appears after the organisation name.

To revert to the previous behaviour:

1. Run the Configuration Editor and select the layout being used to format UK addresses.
2. Fix the *Department*, *Organisation*, and [...] elements on the preferred line.
3. Use the Auto Formatting dialog to deselect the *Department* element. This prevents the department from appearing twice.

6.6 Multiple Element Labels

Note:

This only applies if upgrading from version 2.3 or earlier.

Address element labels are used for display purposes and identify the elements that have been fixed to each line; e.g. "City" or "Postcode". Version 3.0 changed the default behaviour so that labels are no longer returned where multiple elements have been fixed to a line.

To revert to previous behaviour:

1. Edit the qawserve.ini configuration file.
2. Add the setting MultiElementLabels=Yes (overwriting any existing setting).

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