



TECHNICAL SUPPORT ARTICLE

TSA 0008 - Relates to: Re-locating Qudos 3 to a new server.

<https://qudos-software.com>

Re-locating Qudos 3 to a new server.

Purpose and scope

This article applies to self-hosted customers relocating Qudos 3 to a new server. This instruction applies to version 3.36 or later.

General notes

Your licence allows for a co-located, non-production copy of Qudos 3 to be installed for Training / Test purposes. This is generally referred to as the Training Copy. We recommend re-locating / setting up a training copy first to verify all steps before repeating the exercise with the live or production copy.

We recommend separate application and database servers for enhanced security. However, the one server may be used in on-premise situations.

Preparation

Read these notes in their entirety before proceeding. If you have any concerns, contact us using the Tech Support Request Form – available on our web site.

The installation should be performed by a competent I.T. technician – experienced with Microsoft SQL and DotNet applications. If required, Qudos can perform the installation / transfer for you. Contact us for details.

The new installation should be performed using the latest version of the software. Please verify that you are currently using the latest version. The version number is displayed in Help/About. It may also be checked using SQL server management tools – The version number is displayed in tblConfig. If the existing installation is not the latest version, we generally recommend updating it first – before transferring any files to the new installation. Product updates are available to all maintenance subscribers via our downloads portal, and support is not generally available for earlier versions.

Take a note of the database connection string in your existing web.config file. This will need to be updated in your new web.config file.

Make a backup copy of your existing application's SQL database and document folders (Master, Archive, and Reference).

Install on new server

Follow instructions for a new installation as per the Admin Guide. This is available from the Downloads portal (link available at: <https://qudos-software.com/tech-support-qudos-3>). Please note: Login credentials are required.

There is a separate installation for the Reminder program (QS3 Notify).

There is also a separate installation for the external Master Document Viewer (for use with on-premise installations only).

All the required files are available for download from the portal.

File transfer

Restore your backup copy of the SQL database to the new database server.

Restore the backup document folders to the new application server. Ensure that your folders have the appropriate security settings.

Check and adjust the application' web.config connection string as required.

Registration

For Qudos 3 to be activated on your new server, you must re-register the software. Contact [Qudos Tech Support](#) and provide the client organization name and the new server's IP address as shown on the application's registration page. Further details are included in the Admin Guide.

Basic Functionality Testing

We recommend verifying the functionality of the Training copy before transferring the live or production installation. Basic functionality checks would include:

- Logging in
- Opening a document from the Master Document List
- Revising a document
- Creating an Action from the New Action button on the Main Screen
- Re-assigning an Action and verifying the email notification
- Adding an attachment to a record

These checks will verify that the installation basic setting have been completed correctly. If any are unsuccessful, please re-check the relevant steps in the installation process.