

Upgrade Guide

QAS Pro API Version 6.86

QAS Ltd.

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1. Introduction

This document is designed to assist you in upgrading from an earlier version of QAS Pro API. It is intended to be used in conjunction with the accompanying product manuals. The *QAS Pro API* manual provides general information on the installation and configuration of the API product. The *QAS Pro Client Server* manual is only provided if you have purchased the additional QAS Server component. It contains information on the installation and administration of the server.

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

- QuickAddress Pro API – version 6.1x
- QuickAddress Pro API – version 6.0x
- QuickAddress Pro API – version 5.0x
- QuickAddress Pro API – version 4.3x (localised)
- QuickAddress Pro API – version 4.1x (localised)
- QuickAddress Pro API – version 4.0x
- QuickAddress Pro API (World Version) – version 3.1x (localised)
- QuickAddress Pro API (World Version) – version 3.0x
- QuickAddress Pro API (World Version) – version 2.2x (localised)
- QuickAddress Pro API (World Version) – version 2.0x

If you are upgrading from any versions 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 the Utilities appendix in the *QAS Pro API* manual for details about the UK Layout Migration Utility.

If you are upgrading from a localised version (as listed above) then it is important to note that this version only supports International English and American English. Support for French, Dutch and German will be made available in a future release.

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 manual 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 QAS Pro API. Further information relating to these features can be found in the accompanying product manuals.

2.1 Version 6.86

- Fixed several multi-threaded race conditions in the API.
- Fixed country element returning for ZZ searches in Healthcoder
- Fixed suppression data plus crashing the API

2.2 Version 6.85

- Support added for AddressBase Premium data.

2.3 Version 6.78

- Support added for Welsh PAF data.

2.4 Version 6.77

- Support for Street Level Validation.

2.5 Version 6.75

- Support for Advanced Popup options.

2.6 Version 6.65

- Support within V6 suite for Address Layer 2 Data.

2.7 Version 6.05 / 6.10

- Support within V6.0 suite for Belgium, Canada, Denmark, Finland, France (excluding France Premise Level Data – FRX), Germany, Ireland, Luxembourg, Netherlands, Norway, Singapore, Spain, Sweden, Switzerland and USA (excluding US Names and US Enhanced) data.
- Vista compatible with exception of Configuration Editor. In order to run Configuration Editor under Vista, you must have administrator rights on the local machine.

2.8 Version 6.03

- Ability to perform key search on electricity and gas meter serial numbers with UK utility data.

2.9 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).
- Introduction of a key search engine, to retrieve addresses using an associated unique identifier (such as a gas meter number).
- Ability to search concurrently on multiple datasets within a country – for example, consumer names and business names.
- Improved (HTML-based) help system; API Help re-introduced.

2.10 Version 5.0

- Support for US consumer names data.
- Support for New Zealand data.
- Email notification to warn of imminent data and licence expiry (client/server version only).
- AMAS 2005 certification (Australia only).

2.11 Version 4.1

- Localisation for French, Dutch and German.

2.12 Version 4.0

- Support for UK consumer names data (edited/enhanced Electoral Register).
- 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.
- Introduction of new Primary API. This provides a simpler and cleaner interface to work with and lays the groundwork for future development.
- WV Compatibility API. Compatible with the Primary API that shipped with version 3.1 and earlier.
- Single Typedown mode. The three original modes (Street, Organisation, and PO Box) have been merged into one.
- Context sensitive picklist prompts; e.g. "Enter building number/name".
- Improved searching and scoring of premises and sub-premises information.
- Enhanced scoring of similar looking characters; e.g. zero and letter o.
- Warning displayed when an old (recoded) UK postcode is searched upon.
- Barcode support for UK and the Netherlands.
- Increased client/server scalability (connect-on-demand).
- Introduction of Licence Management. This requires activation keys for each data set that has been purchased.
- AMAS 2004 certification (Australia only).

2.13 Version 3.1

- Localisation for French, Dutch, German and Spanish.
- Support for French premises-level address data.
- Support for Singapore sub-premises level address data.

2.14 Version 3.0

- Improved formatting, sortation and grouping of picklist information.
- Country specific sortation rules to cope with diacritic characters; e.g. á and ü.
- Introduction of informational prompts; e.g. "Continue typing for organisations".
- Reduced server footprint per client (client/server version only).
- Improved performance with regards starting-up and changing countries.

- Introduction of *Country Information Guides* providing information on all data sets associated with a single country.
- AMAS 2003 certification (Australia only).

3. Upgrade Instructions

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.

3.1 Standard Installation (non client/server)

If you have purchased the additional QAS Server component then you should follow the instructions in section 3.2.

To install the new version of software:

1. Follow the installation instructions in the *QAS Pro API* manual. Make sure you install the software in a different folder to any previous installations of the product (rather than overwriting them).
2. 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 data sets and configured address layouts.

- a. qaworld.ini
- b. qawserve.ini
- c. qalcn.ini

If you are upgrading from version 3.1 or earlier, then qalcn.ini will not exist. Instead, you will need to use the supplied licence keys to enable access to your installed data sets. See the *Installation* section in the product manual for more information.

3. Run the test harness to verify that the installation was successful. See the API Sample Code chapters in the product manual for details on how to do this.
4. Review and act upon any other compatibility issues as highlighted in section 4.

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

3.2 Client/Server Installation

This section is only relevant if you have purchased the additional QAS Server component. Note that it is important that you upgrade both the server and the clients at the same time, as they are not compatible with previous releases.

To install the new version of the server:

1. If you wish to run an old version of the QAS 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. Install the QAS Server. Follow the installation instructions in the *QAS Pro Client Server* manual. Make sure you install the software in a different folder to any previous installations of the server (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 data sets and configured address layouts.

- a. qawserve.ini
- b. qalcn.ini

If you are upgrading from version 3.1 or earlier, then qalcn.ini will not exist. Instead, you will need to use the supplied licence keys to enable access to your installed data sets. See the *Installation* section in the product manual for more information.

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 *QAS Pro Client Server* manual.
5. Repeat step 4 but this time modifying the qaworld.ini configuration file. This ensures the supporting utilities such as the Configuration Editor know the correct IP address and port number of the server.

To install the new version of the client:

6. Install the QAS Pro API client. Follow the installation instructions in the *QAS Pro API* manual. Make sure you install the software in a different folder to any previous installations of the product (rather than overwriting them).
7. Copy the qaworld.ini configuration file from the previous installation, overwriting the default copy of file that has just been installed.
8. Edit the qaworld.ini configuration file and locate the ServerAddress setting. Update this if it does not specify the correct IP address and port number of the new server. For more information, see the Configuration Settings chapter in the *QAS Pro Client Server* manual.
9. Run the test harness to verify that the installation was successful. See the API Sample Code chapters in the product manual for details on how to do this.
10. Review and act upon any other compatibility issues as highlighted in section 4.

It is not necessary to repeat steps 6 to 8 in order to install the API client on all the required machines. The folder that contains the installed software can simply be copied in its entirety. Note that you must be correctly licensed in order to make the required number of copies.

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

4. Compatibility Issues

This section highlights any compatibility issues that should be considered to ensure the newly installed product behaves as expected. It does not describe how to configure new functionality but is instead designed to flag up issues against areas of existing functionality that have changed between releases.

4.1 New Error Codes

New error codes are introduced to deal with new error scenarios. It is important that you fully test your application integration to ensure that the generation of these errors do not cause unexpected problems. The following tables list out the error codes that have been introduced into this and previous releases.

4.1.1 Version 4.0

Value	Code	Description
-11510	qaerr_LICENCENOTFOUND	No licence key for the given product and data set was present in the licence key file.
-11511	qaerr_LICENCEEXPIRED	A full licence key for the given product and data set is present in the licence key file, but the date specified in the licence has passed.
-11512	qaerr_EVALUATIONEXPIRED	An evaluation-only licence key for the given product and data set is present in the licence key file, but the date specified in the licence has passed.

4.1.2 Version 3.0

Value	Code	Description
-1074	qaerr_NOLOCALEFILE	This is generated at start-up if the <i>qalcl.dat</i> file is missing. This is a new file that is used in the handling of diacritic characters.
-2835	qaerr_SERVER_FULL	This is returned to the client when a connection attempt is rejected because the maximum permitted number of clients are already connected.
-2836	qaerr_SLMAXMATCHES	A single line search has resulted in too many matches.

4.2 Primary API

4.2.1 Changes in Version 6.0

The constant `qaengine_KEYFINDER` is now supported for the `QA_GetEngine` and `QA_SetEngine` functions, to provide access to the key search engine.

A new function, `QA_GetEngineStatus`, has been added to the API. This enables you to determine whether a particular search engine is available for the current dataset(s) you are using.

Please see the *API Manual* for more information.

4.2.2 Upgrading from versions prior to 4.0

Version 4.0 introduced a brand new Primary API, not compatible with previous integrations.

Between versions 4.0 and 5.0 a compatibility API was available to enable customers to upgrade easily (without access to any new functionality). From version 6.0, this compatibility API is no longer available; customers upgrading from version 3.1 or earlier will need to rework their integration to use the current API.

4.3 User Interface API

A new flag, `qaattribs_KEYFINDERSEARCH` has been introduced. This can be used with the functions `QAProWV_UIStartup`, `QAProWV_UIGetFlags` and `QAProWV_UISetFlags`. See the *API Manual* for more information.

4.4 Defining the datasets used by Pro

In Version 6.0, the method of defining which datasets are available for use in Pro has been changed. This facilitates the ability to search concurrently on multiple datasets within a country.

To support this, the `qawserve.ini` configuration file must be updated, with the `InstalledCountries` keyword being replaced by two new keywords: `InstalledData` and `DataMappings`.

On Windows, the necessary changes to `qawserve.ini` will be made automatically by the Pro installation program if you install Pro over your previous version. If you choose to create a fresh installation, the “copy my settings from” installer option can be used to migrate your existing settings to the new format. Alternatively, the Configuration Editor can be used to reconfigure the datasets used by Pro.

If you wish to update `qawserve.ini` directly yourself, details of the two new keywords are contained in the *Database Installation Settings* section of the *Pro API* manual.

4.5 Typedown Legacy Mode

Before Version 4.0, the Typedown search engine had three separate modes to enable separate searching for street, organisation or postal box addresses. In Version 4.0, these were merged so that the user no longer needed to make this choice, with any relevant matches being returned.

Versions 4.x and 5.x provided a Typedown legacy mode, which enabled the old behaviour to be retained for those upgrading. This legacy mode has been removed in Version 6.0.

To remove the obsolete configuration settings that controlled this behaviour:

1. Edit the `qaworld.ini` and `qawserve.ini` configuration files (the setting can be read from either).
2. Delete the setting `TDLegacyMode`.

4.6 Stepping into USA Ranges

Note:

This only applies if upgrading from a version earlier than 5.0.

Version 5.0 introduced the ability to step into USA ranges. The resulting picklist contains details of all addresses that are known to physically exist. This functionality helps reduce the overall size of picklists as well as simplifies the navigation and selection of addresses. See the *USA Country Information Guide* for more information.

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

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

4.7 UK Postally Not-required Localities (PNRLs)

Note:

This only applies if upgrading from version 3.1 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 4.0 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.

4.8 Formatting of UK Organisations and Departments

Note:

This only applies if upgrading from version 3.1 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.

4.9 Use of Informational Prompts

Note:

This only applies if upgrading from version 3.1 or earlier.

Version 3.0 saw the introduction of informational prompts, which are displayed within the picklists to help guide the user. For example, the prompt "Continue typing (too many matches)" is displayed at the beginning of a Typedown search.

4.9.1 User Interface API

Version 3.x allowed for the informational prompts to be disabled, so that the product would revert to version 2.x behaviour. It has been decided that providing such backwards compatibility is no longer appropriate especially as version 4.0 further increased the use of the information prompts.

To remove the obsolete configuration settings that controlled this behaviour:

1. Edit the qaworld.ini configuration file (or qawserve.ini if using the client/server version).
2. Delete the settings `InformationalPrompts` and `UISelectInformationalPrompts`.

4.10 "No Matches" Message

Note:

This only applies if upgrading from version 2.2 or earlier.

Version 3.0 introduced the capability to change the standard "No Matches" message that appears in the picklist. This is so that the user can be prompted to accept the entry of unknown premise or sub-premise information. The exact mechanism for doing this is dependent upon the interface used.

4.10.1 Primary API

To simplify integrations, the user is prompted to append an exclamation character (or similar) to the unknown premise or sub-premise. To enable this functionality:

1. Edit the qaworld.ini configuration file.

2. Add the following settings:

`ForceAccept=!`

`NoMatchesMessage=Address not recognised (append '!' to enable acceptance)`

4.10.2 User Interface API

The user interface supports this functionality by the user pressing Ctrl+Enter. To make sure the user is aware of this functionality:

1. Edit the qaworld.ini configuration file.

2. Add the following setting:

`NoMatchesMessage=Address not recognised (press Ctrl+Enter to accept)`

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