OCEAN DATA SYSTEMS
The Art of Industrial Intelligence

Dream Report®

Industrial Reporting and Analysis

Project Upgrade Procedure

Rev. 2020-03-30

Table of Contents

1. Summary

The aim of this document is to assist Dream Report users in upgrading their projects to the latest versions.

This document is applicable to Dream Report versions 3.x, 4.x, and 5.x

2. Before Upgrading

Before upgrading, backup your actual Dream Report project. Save a copy of complete project folder including all subfolders. Dream Report projects are located in the **Project** folder of your Dream Report installation (by default **C:\ODS\Dream Report\Project**).

If your project is using a SQL Server database for data logging, the SQL database files may be located in the **\Database** subdirectory. Since SQL Server locks those files, you will need to omit that folder from the project folder copy (or stop SQL Server during the copy).

3. Upgrading Dream Report – Important Notes

Although Dream Report can be installed as an upgrade on top of the previous version, it is recommended to uninstall the previous version first, restart the PC, and then install the new version of the product. Restart your computer after installation.

If Dream Report Web Portal is used, Microsoft Internet Information Services (IIS) has to be configured properly. Refer to the "*Manual Configuration of IIS for use with Dream Report Web Portal*" tech note.

If the *Version Control* feature was used in a project prior to version 4.8, then all project version history will be reset after the upgrade, as a new mechanism for project version control was introduced in version 4.8.

You can find more information on installation process in the Dream Report Help/User Guide under the "*Dream Report Installation Tips*" section.

Important note if the *Viber* messaging app is installed on the same machine as Dream Report:
If uninstalling Dream Report prior to new install on a machine that has the Viber messaging/call software installed, please first shut down the Viber Desktop version, as it will prevent a complete Dream Report uninstall.

4. Upgrading Projects from Versions 4.x and Higher (from Any to All versions)

If your project is upgraded from Dream Report versions 4.0 or newer, do the following steps:

☐ Open Dream Report Studio and load the existing project. You will be warned: "*This Project was created by the previous version of the product. To upgrade it to the currently running version please press "Yes". Otherwise, press "No" and run in version it was built*"

NOTE: Once you click "*Yes*", you cannot downgrade the project to the previous version. Therefore, ensure to that your project is backed up before performing this operation.

☐ Click **Yes**. The project will be upgraded.

☐ Save and re-run the project

5. Upgrade Procedures for the Projects Configured for Remote and Concurrent Development

The new "Remote and Concurrent Development" feature was introduced in Dream Report 4.8. If Remote Development Configuration is being used in a project, a separate approach is needed for the project upgrade. Dream Report project configured for remote development can be upgraded in one of two ways, depending on whether or not the project versioning history needs to be available after upgrade. *Approach 1* keeps the existing repository and maintain the version history, whereas *Approach 2* creates a completely new repository during the upgrade.

If <u>not</u> using the "Remote and Concurrent Development" feature, this section can be ignored – simply follow the steps in section 4. above.

Approach 1 Upgrade Procedure:

☐ Perform the **Commit to Repository** command from local project copies into the project repository to synchronize all machines.

☐ Close and stop all local projects. Then, make backups of all local project folders.

☐ Install/upgrade the Dream Report software on all machines, including the server where repository is located. The Dream Report version <u>must always be identical</u> on all the computers.

☐ Start Dream Report Studio and open the project on <u>one</u> machine only. Upgrade the local copy of the project, **Save** and **Commit** the project into repository as follow:

- Select the first option when prompted – **Select to save changes into the local Project's copy**

- Once project is upgraded, in Dream Report Studio, go to the **Remote Development** tab and perform **Commit** of the project into the repository

- Select **all modules and reports** and press **OK** button.
  NOTE: It is recommended to set a dedicated comment - i.e. "Commit after version upgrade".

☐ Delete local project copies on all other development computers and on the production server, then do a fresh checkout/deployment from the repository onto those machines.
  NOTE: This step has to be performed carefully in order to avoid any conflicts during the local copies' upgrade.

Limitation: After upgrading to DR 5.x the "*Revert to previous revision of the project/report*" cannot be done. This issue was registered as known issue and will be addressed in an upcoming release (after DR 5.0 R20-1).

Approach 2 Upgrade Procedure:

☐ On all development PC's, perform an **Update from repository** command, and then **Commit to Repository** command from the local project copies into the project repository. This will synchronize all changes done on development PC's to the central project repository.

☐ Close Studio and stop all local projects (if running) on all development PC's.

☐ On the Report Server (Repo), change the Remote Configuration access code to ensure no one is able to connect, and save the project.

☐ Install/upgrade the Dream Report software on all machines, including the server where the repository is installed. The Dream Report version must be always identical on all the computers.

☐ Backup the old *<your project>.**drrepo*** file and remove it from the original location.

☐ On the server, start Dream Report Studio, open the project and perform the upgrade for the local copy of the project (*<your project>.**drpj***).

☐ After upgrade, open the **Remote Development Configuration** dialog in Dream Report Studio. On the **Server** tab uncheck the option **Enable connections to the project for the concurrent development**. On the **Client** tab clear the **Repository File** path.

☐ Save and close Dream Report Studio.

☐ Open Dream Report project again, open the **Remote Development Configuration** dialog, ensure that **Remote Access Code** is identical on both **Server** and **Client** tabs. On the **Server** tab activate **Enable connections to the project for the concurrent development** check box and press **OK**. You will be prompted to create a new repository. Follow all the instructions until the moment the project will be reloaded and connected to the repository.

☐ On all the Development computers, connect to the repository and do a fresh checkout of the local Dream Report project copy.

☐ On the Production server, install the same version of Dream report, open Studio and upgrade the local copy of the project, and then start it up. Ensure that proper settings in the **Runtime Configuration** window are done (Run in Service Mode option, project startup, etc.).

NOTE*: After creation of a new project repository, the old versioning history of the project and reports will no longer be available. Version of the project and revisions of the reports will start from version "1" again.

6. Upgrading Projects from Versions 3.x

Project Logger Database Upgrade

Starting from version 4. x, Dream Report has the new internal Logger database structure; therefore, if the customer needs to keep previously stored history, the database from previous versions has to be converted/migrated.

If your Dream Report project is configured so that data is logged into the internal Dream Report database, do the following steps:

- ☐ Make a backup of your logging database – either copy the file (*<project name>.mdb,* if using MS Access) or use the database's backup tool to create a database backup.
- ☐ Run **Database Convertor** (**DBConverter.exe**) from the ODS\Dream Report\System folder.

Select the path where your Dream Report Project is located and click **Convert**.
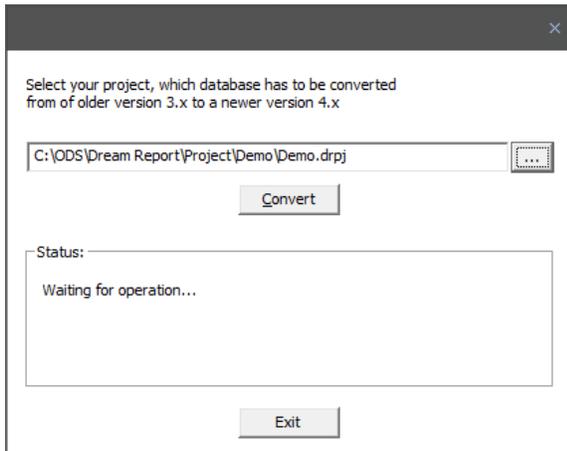
Note that the time required to convert the complete database depends on the amount of data stored in the database.

DSN Settings (SQL Server Connection)

If, before upgrading to version 4.7x, ODBC DSNs (Data Source Names) were defined in the Dream Report project to connect to SQL databases (SQL Server 2008, SQL Server 2005, SQL Server 2000, 7.0), then the driver in the DSN definitions must be changed to the **SQL Native Client 11.0** driver.

Runtime Mode and Start up Options

Starting from Dream Report Version 4.x, it is possible to configure the Dream Report runtime engine to run as a Windows service or as an application. By default, Dream Report runtime will start as an application. In order to set runtime engine to run as a service, go to **Dream Report Studio -> Runtime** and click on the **Runtime Configuration** button. The **Runtime Settings** configuration window will open:
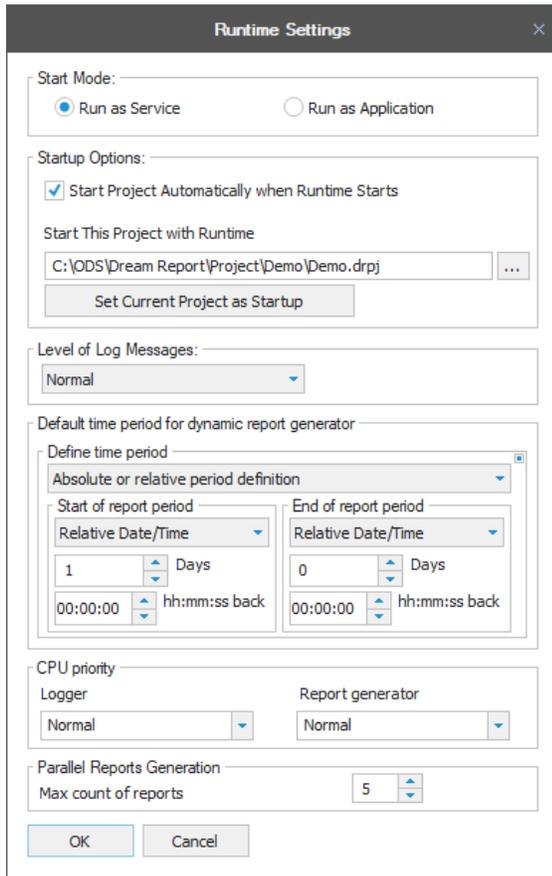
If your project has to be launched by default when runtime starts, specify this in the **Startup options** section in the **Runtime Settings** configuration window (see picture above).