Upgrade Reporting Solutions

Overview

XLReporter projects from Versions 9 to 12 can be upgraded to the latest version. This can be done either on the same machine or by installing **XLReporter** on a new machine and transferring the project to the new machine.

The following document describes how to upgrade to the latest version. The document is divided into two sections:

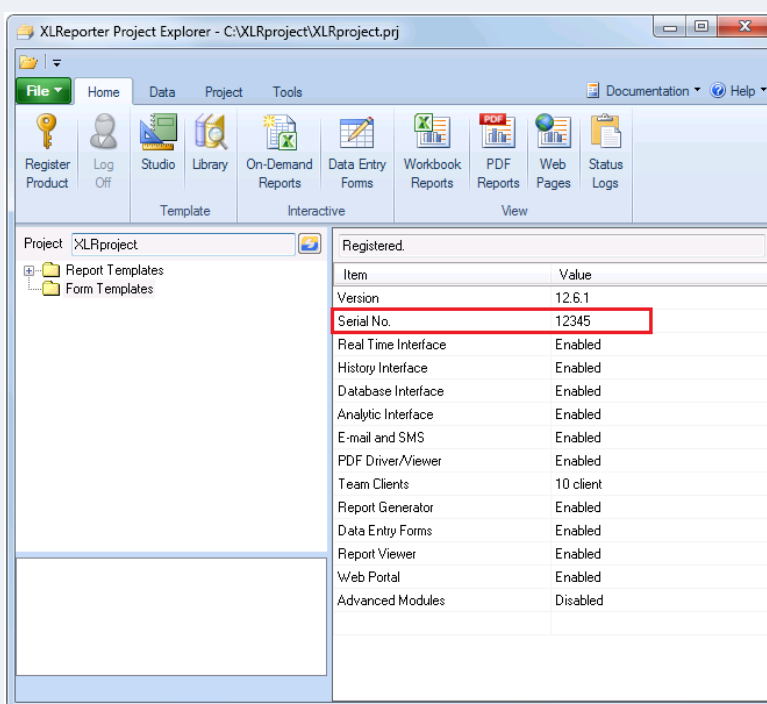- Upgrade from Version 12
- Upgrade from Versions 9 to 11

Follow the section that applies to the current version of **XLReporter** installed.

Upgrade from Version 12

The following describes upgrading from version 12.

Record the Serial Number

Make note of the serial number in the current version.

The serial number can be found in the **Project Explorer** in the lower right panel.

Stop the Schedule

From the **Project Explorer**, under the **Project** tab, in the **Schedule** section click the **Start/Stop** option and choose **Stop**.

Upgrade the Same Machine

If **XLReporter** is being upgraded on the same machine, at this point close all **XLReporter** applications including the **Project Explorer**.
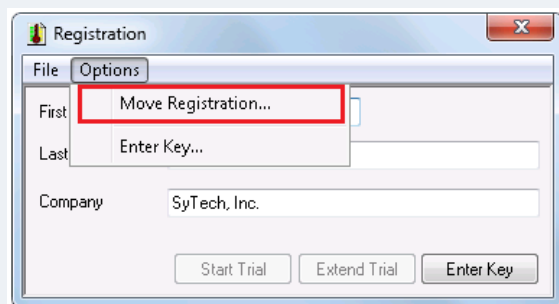
Installation

Run the installation for the latest version. As part of the installation the project is upgraded automatically.

Upgrade to a New Machine

If **XLReporter** is being installed on a new machine, the license will have to be transferred to the new machine.

Transfer Registration

To transfer, from the **Project Explorer**, under the **Home** tab select **Register Product**.


In **Registration** select **Options**, **Move Registration**. Make note of the **Transfer Code**, it will be needed when registering the latest version on the new machine.

Installation

Run the installation for the latest version on the new machine. When complete the **Project Explorer** is opened with the Demo project loaded.

Copy Project

At this point the project used with version 12 should be copied from the original machine to the new machine.
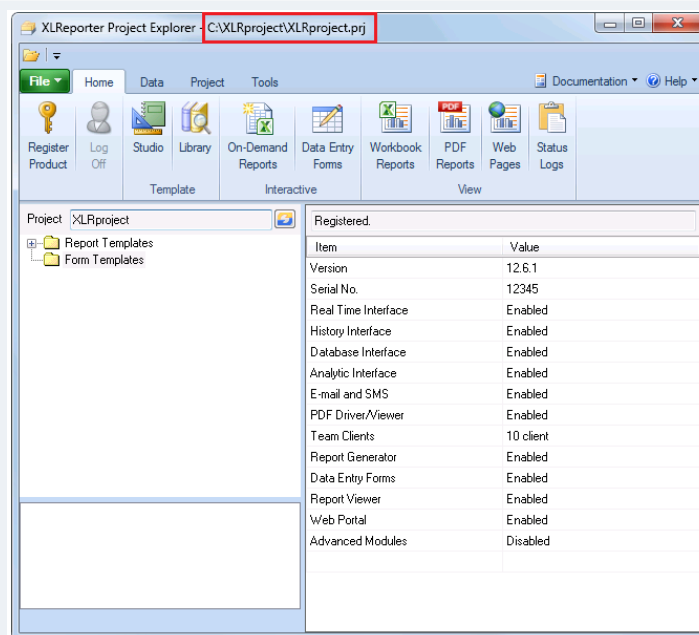
The location of the project is displayed in the title bar of the **Project Explorer** on the original machine. This folder must be copied from this machine and pasted on the new machine.

Once the project is pasted on the new machine, in the **Project Explorer** of the new machine select **File, Open Project**. Browse to the project folder and open.

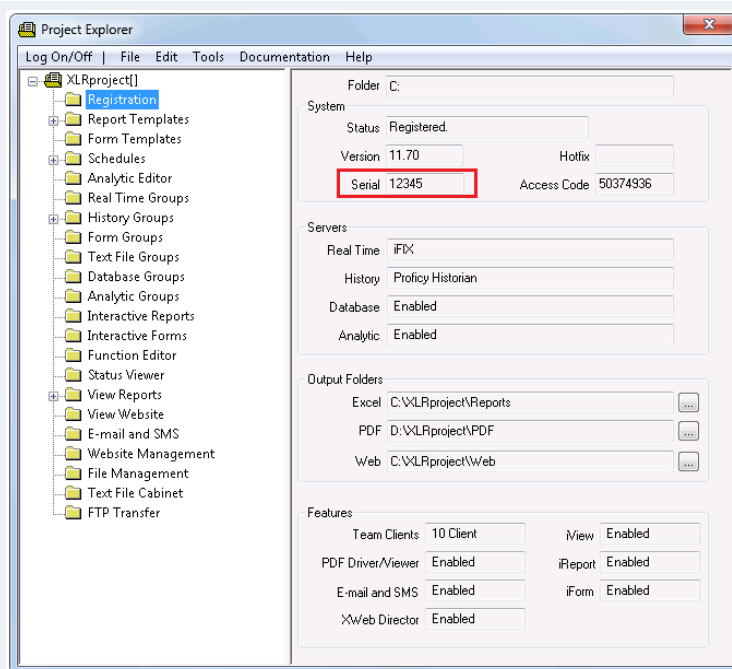This triggers an upgrade of the project to the latest version.

At this point the **XLReporter** version 12 installation can be uninstalled from the original machine.

Upgrade From Versions 9 to 11

The following describes upgrading from versions 9 to 11 to the latest version.
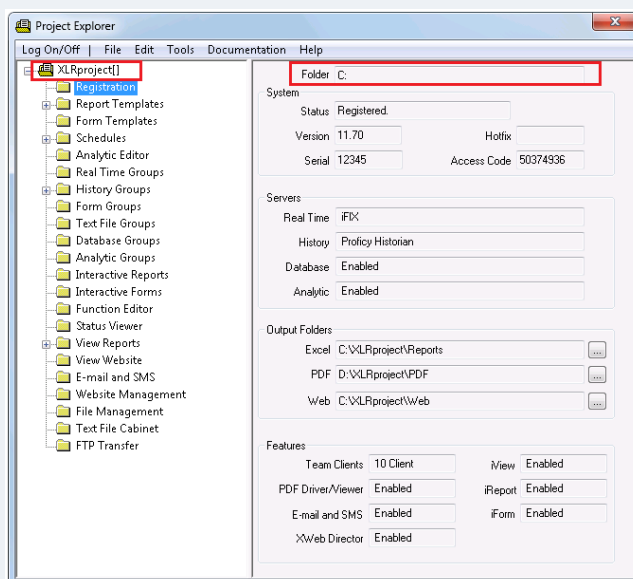
Record the Serial Number

Make note of the serial number in the current version.

The serial number can be found in the **Project Explorer** in the right panel.

Identify the Project

To identify where the project is located in the previous version, in the **Project Explorer**, on the right side, at the top, note the **Folder**. On the left-side note the name at the top of the tree. Combine these to derive the project folder

location. For example, if the **Folder** is *C:* and the project name is *XLRproject*, the project folder to copy to the new machine is *C:\XLRproject*.

Stop the Schedule

If the upgrade is done on the same machine **XLReporter** is currently installed on, stop the schedule.

To stop the schedule, from the **Project Explorer**, on the left side, double click the **Schedules** folder. In the **Schedule Designer** select **Scheduler, Stop** (or **Scheduler, Stop Service** if the scheduler is running as a Windows service).

Please note that if the schedule runs as a service note the service account and password. This information is not retained.

Transfer Registration

If the latest version of **XLReporter** will be installed on a new machine, the license needs to be transferred from this machine.

In the **Project Explorer**, open **Registration**.
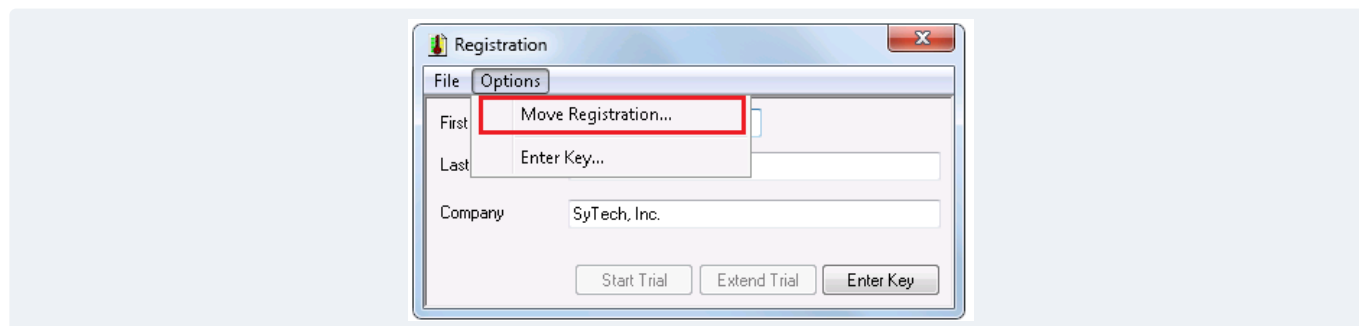
In **Registration** select **Options**, **Move Registration**. Make note of the **Transfer Code**, it will be needed when registering the latest version on the new machine.

Installation

If **XLReporter** is being installed on the same machine as the current installation, close all **XLReporter** applications.

Run the installation of the latest version of **XLReporter**. Follow the prompts displayed by the installation.

Upgrade the Project

If the latest version of **XLReporter** is installed on a new machine, the project from the original installation must be coped to the new machine.

To upgrade the project, from the **Project Explorer** select **File**, **Open Project**. Click the browse button and select the project's *XLRproject.prj* file in the **Input** folder of the project. Click **OK** to open and start the upgrade. A window opens displaying the upgrade process.

After the Upgrade

If a template contained an error or a feature that is no longer supported, it is displayed in the upgrade utility. The display in the utility is saved to the file *Upgrade_Results.txt* is located under the project folder.

Only templates that were scheduled to run automatically or on-demand are upgraded when the project is opened. To upgrade other template files open **C:\XLReporter\bin\XLRiUpgradeFile.exe**.

Run a General System Check

In the **Project Explorer**, on the right-side **Tools** tab, in the **Diagnostics** section, open **System Check**. The **General** tab is used for general tests. Click the **Start** pushbutton to have the installation scan and repair defects. When complete, the display shows the results of the scan.
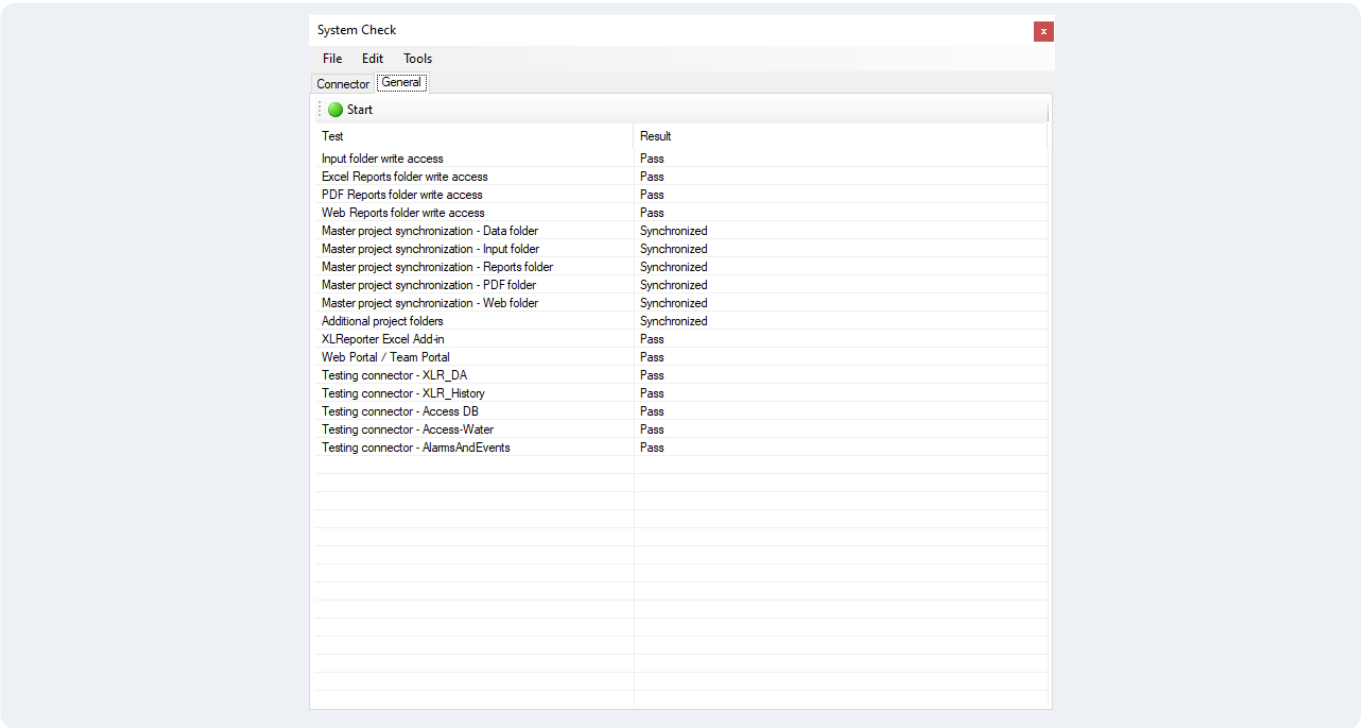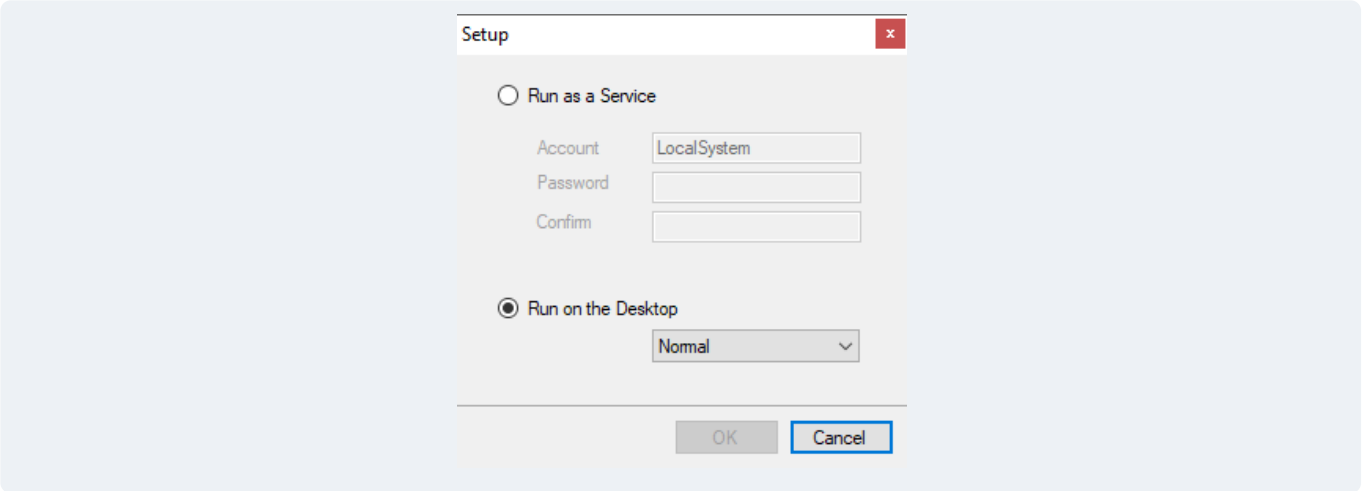

Schedule Automatically

The scheduler can be setup to run on the desktop, in the background or as a windows service.

In the **Project Explorer**, on the right-side **Tools** tab, in the **Reports** section, select the **Schedule Designer**.

Then from then menu option, select **Scheduler**, **Setup**.

Run as a Service

Select this to run the **Scheduler** as a service. As a service, the scheduler is automatically started by the operating system using the **Account** specified. A service **Account** that is not *LocalSystem* must be an **Administrator** account and have a **Password**.

Run as the Desktop

Select this option to run the **Scheduler** on the desktop. The startup can be **Normal**, **Minimized** on the taskbar or **Background** with no icon on the taskbar.

A benefit of running **Normal** on the desktop is that the progress of the schedule is visible providing valuable insight during development.

To run on the desktop, add the shortcut to **C:\XLReporter\XLRSchedule.exe** to the *Windows Startup* folder, configure **XLRschedule.exe** as a startup task in your HMI system (if supported) or use the start option by checking the **Scheduler running** option on the right-side of the **Project Explorer**.

Test Schedule Actions

In the **Schedule Designer**, schedule actions can be tested to verify the connections. Highlight a schedule line and click **Test**. For historical/database sources, the results are exactly what would have been created if they had run in the past. Test can be run over a time period or a single timeframe by making the **From** and **To** the same date and time.

Note that from version 12.0 onwards, the reports are automatically stored into a sub-folder named after the template.
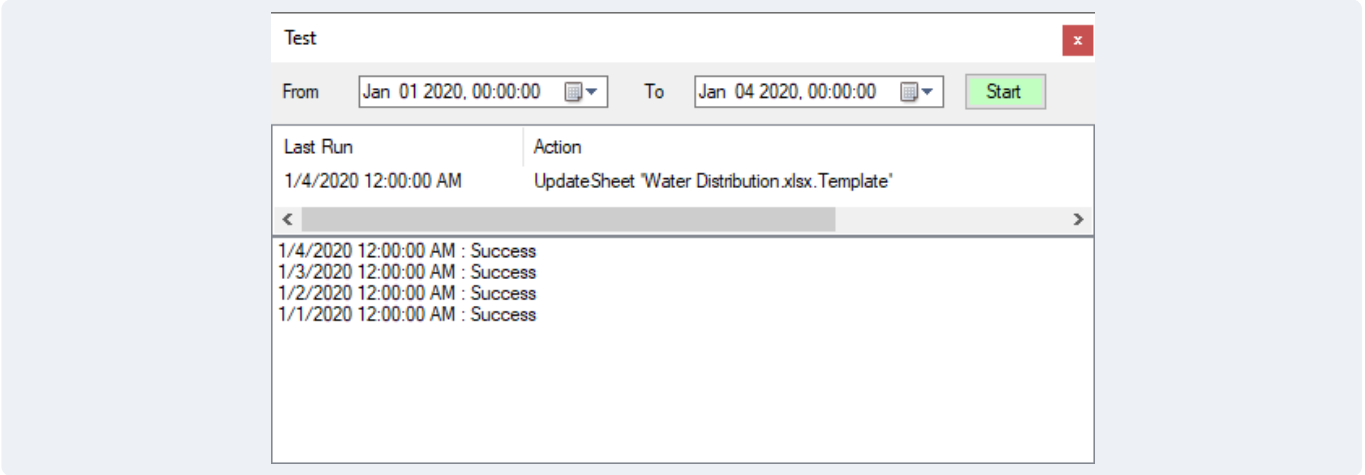
Considerations for a Version 9 Upgrade

CopyBook, CopySheet and XFiler actions are no longer supported in the latest version of XLReporter. These have been replaced with new functionality.

To identify if these actions are in the schedule, open the **Schedule Designer**.

The CopyBook actions were used to create a new report workbook from the template workbook file.

The CopySheet actions were used to create a new worksheet from the template worksheet.

To convert these actions, modify the templates naming convention. Open the template from the **Project Explorer.** In the Template Studio, under the Report tab, open **Report Names**.

The CopyBook settings are added to the **Workbook** setting and the CopySheet settings are added to the **Worksheet** setting. Convert each CopyBook and CopySheet action in the **Schedule Designer**.
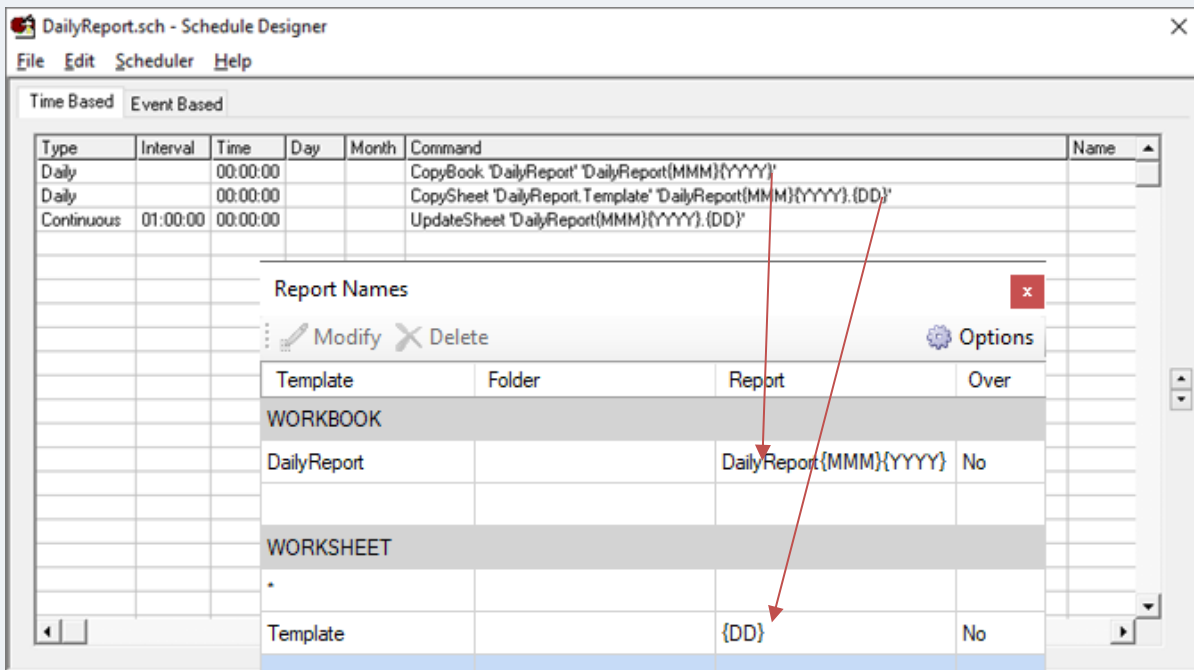
Then go back to the **Schedule Designer** and remove the CopyBook and CopySheet actions. Change the UpdateSheet or UpdateBook action in the schedule to only the name of the template. A browser is provided to select this option.