



Application Note 0005 Upgrading ReportBuilder™ to ReportBuilder™ 2008 Edition

Introduction

This application note is intended for users upgrading ReportBuilder™ version 1.31.c to ReportBuilder™ 2008 Edition.

Upgrade ReportBuilder™

To upgrade, perform the following steps:

1. We recommend that you backup your ReportBuilder™ Server application file and all ReportBuilder™ Excel workbooks before proceeding with this upgrade.
2. Make a note of your ReportBuilder™ Client UDL Setting. The UDL stores the path and filename of your custom ReportBuilder™ project file. A shortcut to the UDL is located in the WorkSmart Automation ReportBuilder programs group. The shortcut is called "ReportBuilder Client UDL". You will need this later.
3. Uninstall all previous versions of ReportBuilder™ Server and ReportBuilder™ Client before installing the new version.

Please note, if your system uses the OpenRDA ODBC connectors for Wonderware or FIX32/iFIX, there is no need to uninstall these components as they have not changed.

4. Once you have uninstalled ReportBuilder™ Server and ReportBuilder™ Client, you may reinstall these applications with the new ReportBuilder™ 2008 Edition using the CD Browser. Follow the installation steps until complete.
5. The installation will change the ReportBuilder™ Client UDL setting from your setting to the Sample Project that is installed. You will need to change the UDL setting back to your ReportBuilder™ project file that you noted in Step 2. For help with this task, please refer to the ReportBuilder™ Client Help topic: **Connecting to ReportBuilder Server: Pointing to a ReportBuilder Server Application File.**
6. The installation path of the ReportBuilder™ 2008 Edition Excel Add-In differs from previous versions. This will require editing the Excel workbook links for all ReportBuilder™ workbooks and changing them to the new ReportBuilder™ Client Add-In installation location. For help with this task, please refer to the ReportBuilder™ Client Help topic: **Troubleshooting: Edit Links Message.** A shortcut to the ReportBuilder™ Client help is located in the WorkSmart Automation ReportBuilder programs group.