

Knowledge Base Article: Article 215

BAI Click&DECiDE Migration
How to install Click & DECiDE - BAI 10.1.2 or greater over
DataSet Vision 5.x or DataSet Report 2009

Date: Updated on September 23rd, 2011

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2. Before the Migration

Click&DECiDE cannot be installed on the same machine where DataSet Vision or DataSet Report 2009 is already installed unless you uninstall first these previous products.

If you do not uninstall these previous products, the Click&DECiDE Setup will automatically detect these program and will ask you to uninstall them before installing Click&DECiDE.

This manual will explain some recommendations to be done before uninstalling DataSet Vision or DataSet Report 2009 if you wish to keep your previous configuration.

Download the last release of Click & DECiDE here:

http://license.clickndecide.com/downloads/cndent_request.aspx

Note: the operations described in this article require a full access to the computer. Be sure to be logged as an Administrator.

3. Section 1: Backup your current configuration

3.1. Backup your License Certificates

For DataSet Vision save your DataSet Vision license that could be in:
C:\Program Files\DataSet\DataSet Vision\d7vision.cert (by default).

Or in the following locations if you were also using the NetReport software's:
C:\Program Files\NetReport\Dataset\d7vision.cert (by default).
C:\Program Files\NetReport\WebPortal\d7vision.cert (alternate)

For DataSet Report 2009 save your DataSet Report license that could be in:
C:\Program Files\DataSet\DataSet Report\ _license.cert (by default).

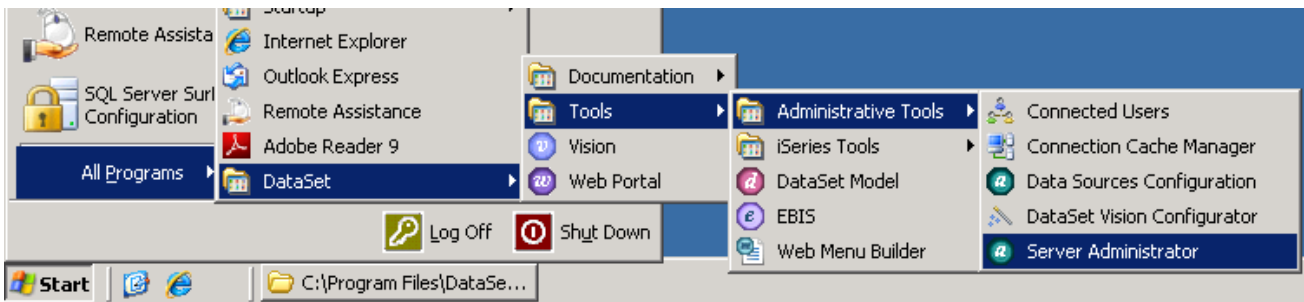
This backup is only necessary if you wish to reinstall later DataSet Vision or DataSet Report 2009.

For Click&DECiDE you will need to get a **new license certificate** (you can get a temporary license certificate if you download the software or ask your provider to get this certificate). Make sure to get this new license certificate before installing Click&DECiDE.

3.2. Backup the DataSet Server Configuration

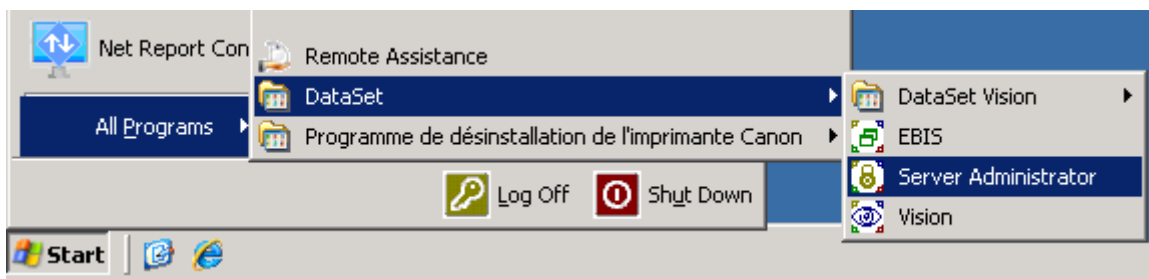
For DataSet Report 2009:

1. Start the DataSet Server **Administrator**: **Start> All Programs> DataSet> Tools> Administrative Tools>Server Administrator**.

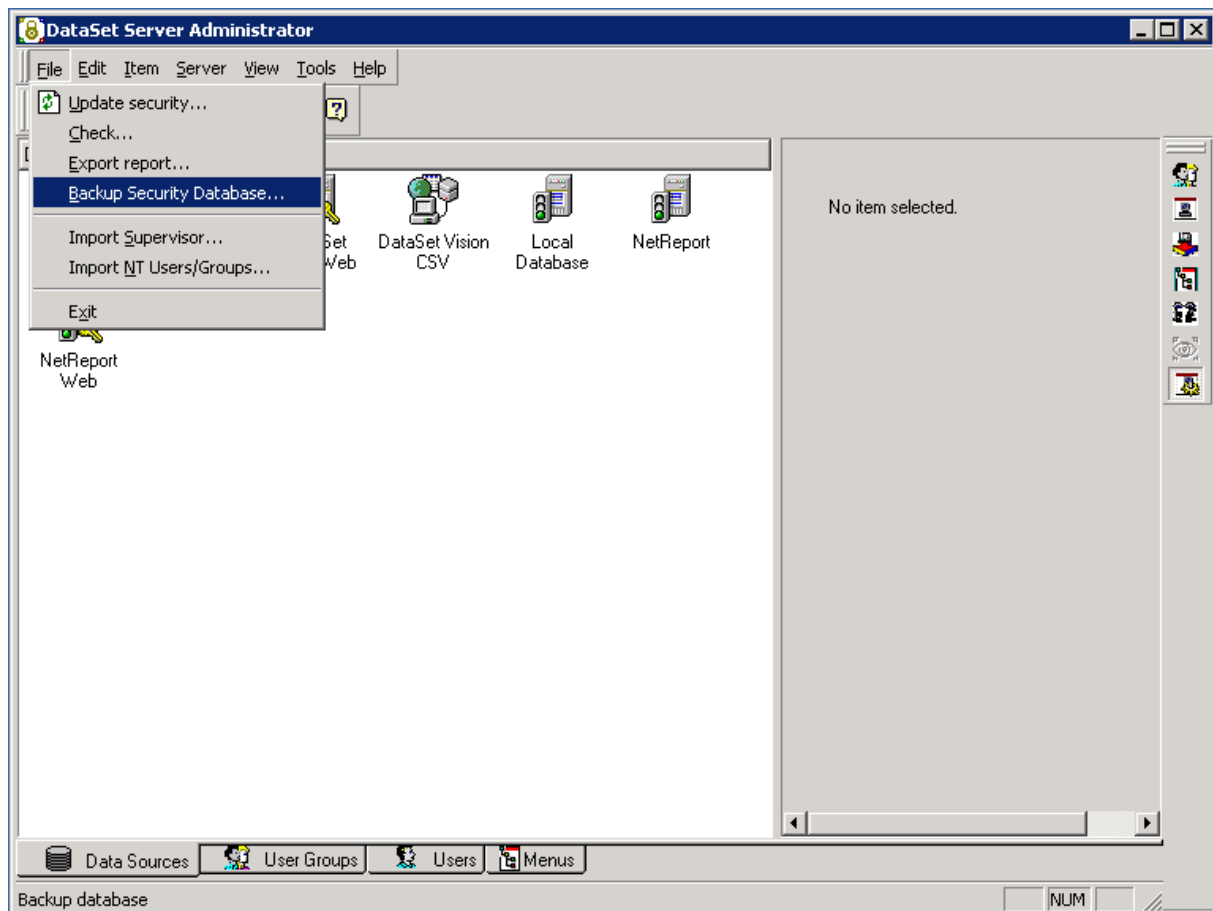


For DataSet Vision:

1. Start the DataSet Server **Administrator**: **Start> All Programs> DataSet> Tools> Administrative Tools>Server Administrator**.



2. Go to **File>Backup Security Database**



3. Save the Security Database configuration into a .bck file.

This backup file contains:

all information about the above Data Sources Tab (Data Source Configuration)
 all information about the above User Groups Tab (User Groups)
 all information about the above Users Tab (Users)
 all information about the above Menus Tab (Menus name and path)

This backup file does not contain:

your DataSet Vision project files (*.wfv)
 your EBIS project files (*.wfd)
 your ASCII List parameter files (*.lst)
 your Web Menu Builder files (*.wmu)
 your Scheduled Tasks
 your DataSet Model files (*.mod)
 your Visual Basic Scripts (*.vbs)
 Any pictures used in your reports or EBIS project files.

4. Close **DataSet Server Administrator**.
5. Save your own **DataSet Vision projects** (*.wfv files) created with the DataSet Vision software.
6. Save your own **EBIS projects** (*.wfd files) created with the EBIS software.
7. Save your own **Web Menu Builder** (*.wmu files) created with the Web Menu Builder software.
8. Save your own **DataSet Model** (*.mod files) created with the DataSet Model software.

9. Save your own **Visual Basic Scripts** (*.vbs files) if needed.
10. Save the external files, for example the **pictures** and the **ASCII List parameter** (*.lst files), used by your own DataSet Vision projects.
11. Save the scheduled tasks configuration file **d7tasks.xml** located at:
C:\Program Files\DataSet\DataSet Vision\d7tasks.xml (by default) or
C:\Program Files\DataSet\DataSet Report\d7tasks.xml (by default).
12. Save your own script (if applicable) which are located at:
C:\Program Files\DataSet\DataSet Vision\TaskScripts (by default) or
C:\Program Files\DataSet\DataSet Report\TaskScripts (by default)

4. Section 2: Requirements for Click & DECiDE - BAI

4.1. Turning on the Required IIS Features

IIS is a Windows feature, to launch the Turn Windows Features On or Off module please follow the steps below:

1. Select Start> Control Panel.
2. Click Programs and Features.
3. Click Turn Windows Features On or Off
4. Select the following Internet Information Services features:
5. Web Management Tools
 - a. IIS Management Console
 - b. IIS Management Scripts and Tools
 - c. IIS Management Service
6. World Wide Web Services
 - a. Applications Development Features
 - i. ASP.NET
 - ii. ASP
 - b. Security
 - i. Basic Authentication
 - ii. Windows Authentication
7. Click OK

4.2. Requirement about the Framework .NET 3.5 SP1

Click&DECiDE needs the Framework .NET to work properly. Note that the Framework .NET 3.5 will be automatically installed by the Click&DECiDE Setup is missing.

Important warning: note that Framework 3.5 must be installed after IIS.

If you wish to install yourself the latest version of Framework 3.5 before installing Click&DECiDE. Follow the link and install the framework:

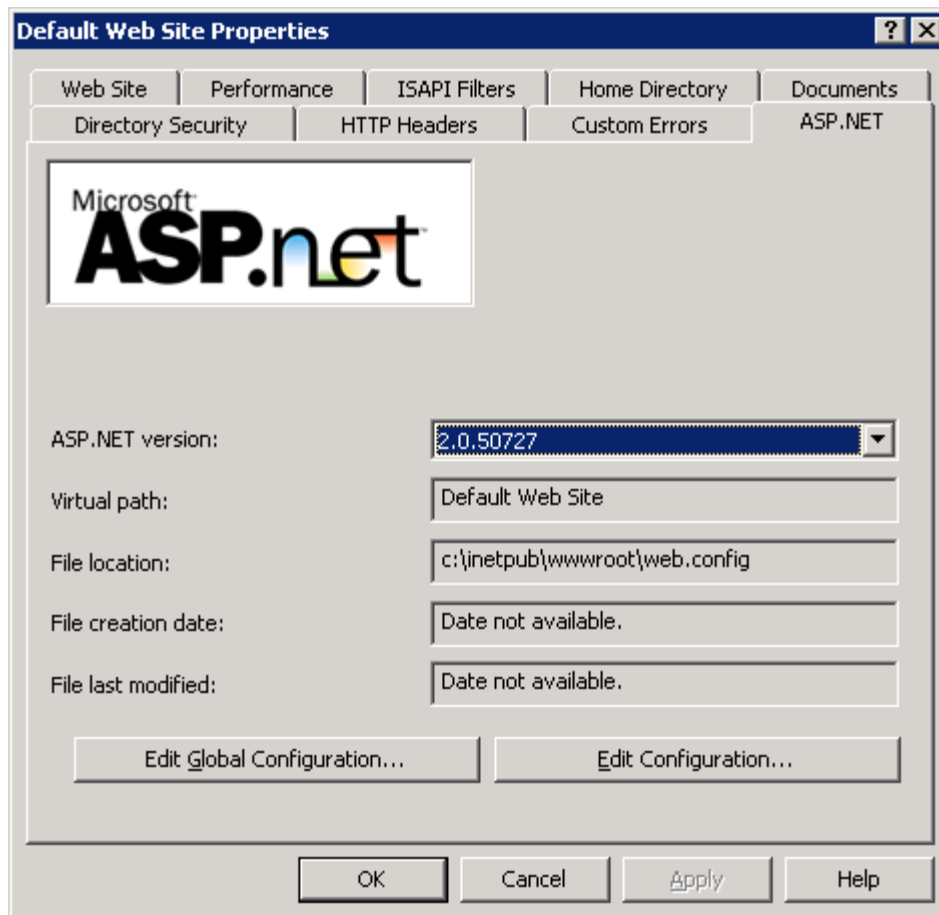
<http://www.microsoft.com/downloads/details.aspx?familyid=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en>

If the Framework 3.5 has been installed before IIS, the problem could be that IIS does not recognize the Framework 3.5. In that case the ASP.NET Tab does not appear in the Default Web Site Properties.

To solve this problem, run the following command: `aspnet_regiis -i`

From IIS Management Console, select the default web site, click on right button and display properties.

The ASP.NET property page should appear as below:



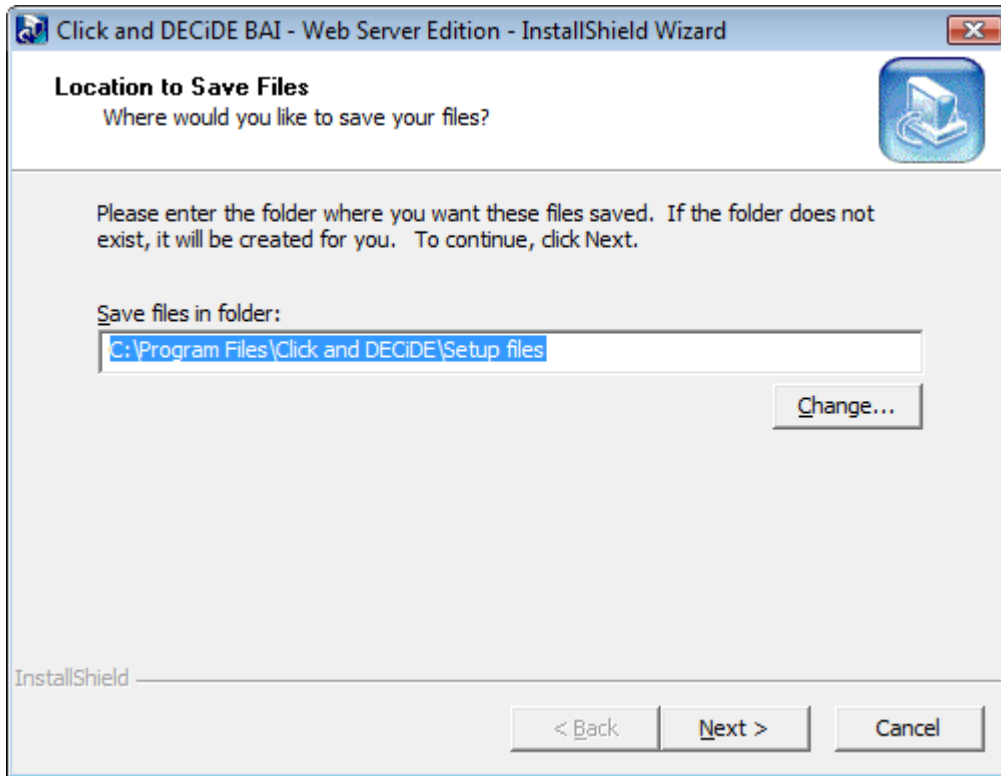
If the ASP.NET property page doesn't appear, try to reboot.

4.3. Download and extract the Click & DECiDE - BAI setup

1. Download the latest Setup of Click&DECiDE BAI Enterprise Edition 10.01.02, **CnD-BAI.10.01.02.exe**, available at:
http://license.clickndecide.com/downloads/cndent_request.aspx
2. Run the **CnD-BAI.10.01.02.exe** setup.



Choose where you want to extract the files required for the installation.



3. Click **Next**.
4. Wait for the extraction to complete. The **Click and DECiDE - BAI Installation Wizard** will launch.

5. Section 3: The Click and DECiDE - BAI Installation

5.1. System Requirements

The Click&DECiDE setup program will check first if the required software is already installed on your computer and will propose to install them if necessary. The Click&DECiDE system requirements are as follows:

Desktop Version (Express and Standard Editions)

Microsoft Web Components
SQL Server Native Client

Web Server Version (Professional and Enterprise Editions)

Microsoft Web Components
SQL Server Native Client
SQL Server 2005 Express or greater
Microsoft .NET Framework 3.5

Note: for the Professional or Enterprise Editions, you must install Microsoft IIS (Interne Information Services) before installing the Microsoft .NET Framework 3.5.

5.2. Environment

Desktop Version (Express and Standard Editions)

Windows XP SP2 or greater
Windows Vista SP1 or greater
Windows 2003 SP2 or greater
Windows 2008 SP1
Windows 7

Web Server Version (Professional and Enterprise Editions)

Windows 2003 SP2
Windows 2008 SP1

5.3. Installation

If you have downloaded the software, please perform the following steps:

Double-click the downloaded file (for example CnD-BAI.WeBServer.10.1.2.exe)

Extract the content by default to the following directory:
C:\Program Files\Click and DECiDE\Setup files

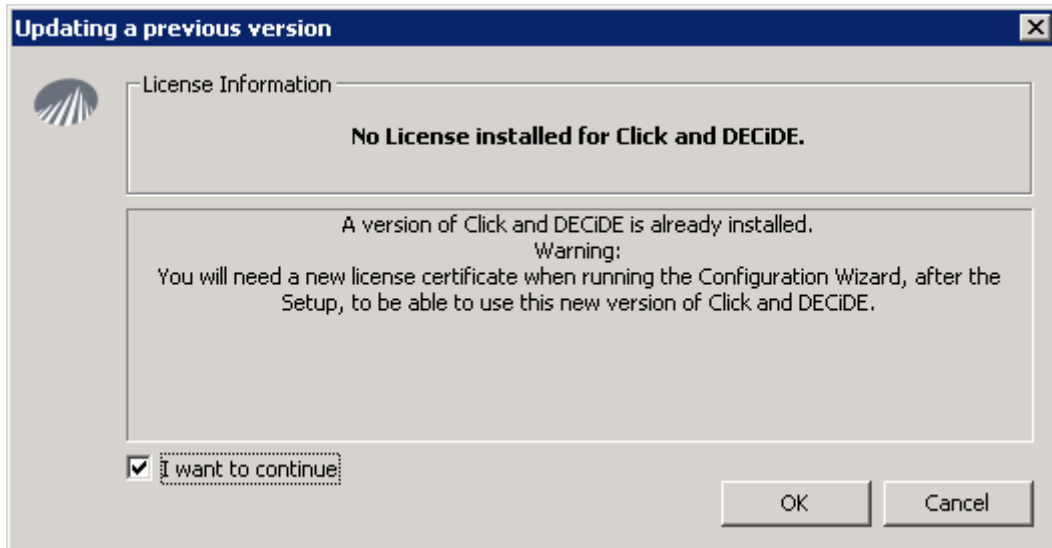
Note the Setup.exe file will automatically run to start the installation.

5.4. Running the Setup.exe File

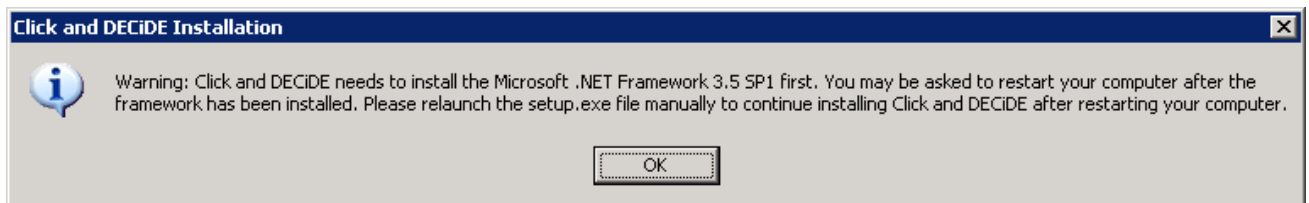
Perform the following steps:

- a. If you have a CD-ROM: double-click the **Setup.exe** file unless your CD drive is defined with an automatic start.
 - b. If you downloaded the software: double-click the downloaded file
- The following screen will appear if the previous software has not been uninstalled:

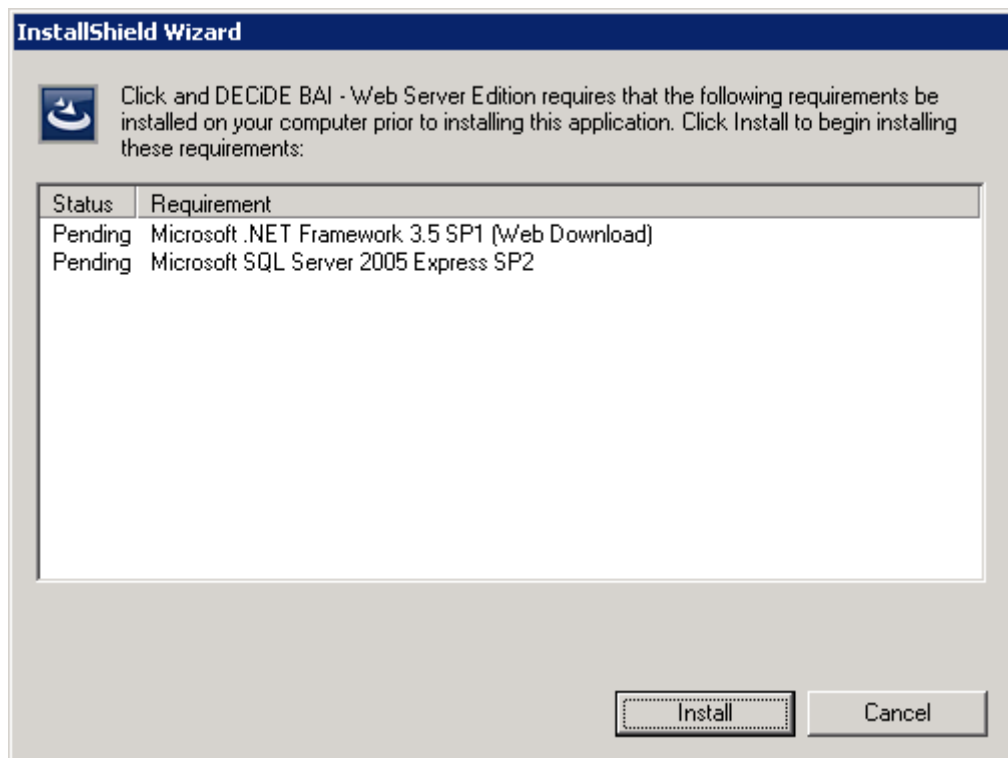
Click "**I want to continue**" then click **OK**



For Click&DECiDE Professional or Enterprise Edition, if the Framework .NET 3.5 is not installed, you will get this message. Click **OK**.



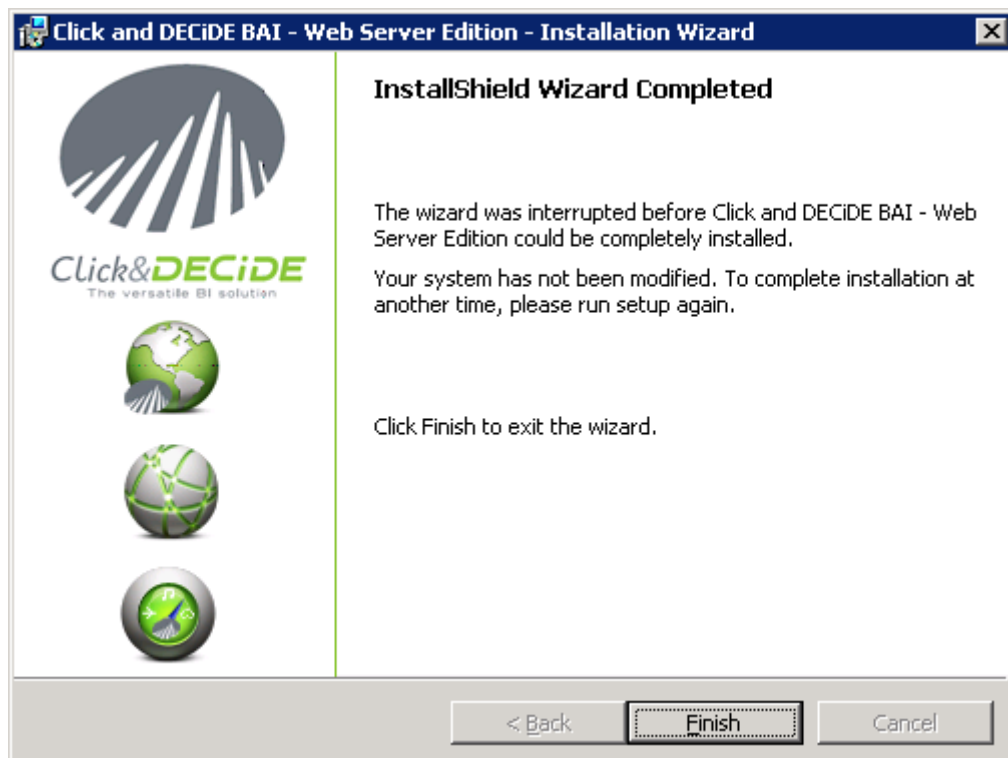
For Click&DECiDE Professional or Enterprise Edition, if SQL Server Express 2005 is not installed, you will get this message. Click **Install** to continue or **Cancel** to abort:



If SQL Server Express 2005 is already installed and the Framework .NET 3.5 is also already installed, and if the detected previous product is not Click&DECiDE but DataSet Vision or DataSet Report, you will get this message. Click **OK**.

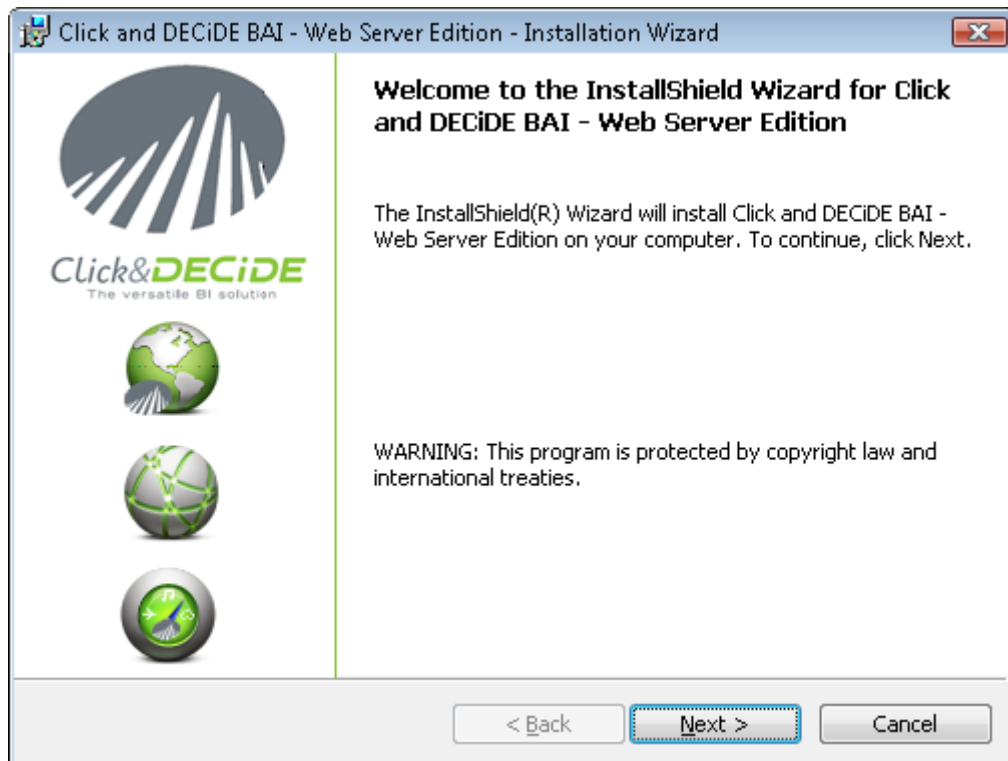


Click **Finish**



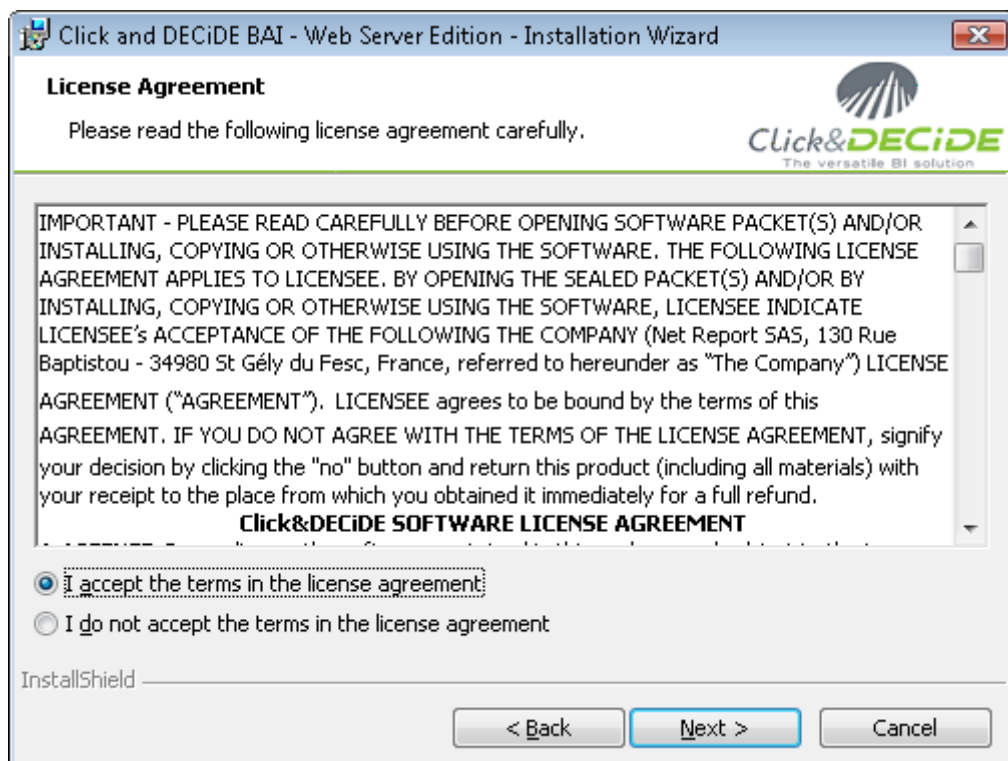
Uninstall the previous software.

Reboot the machine and run again the SETUP.EXE for Click&DECiDE.

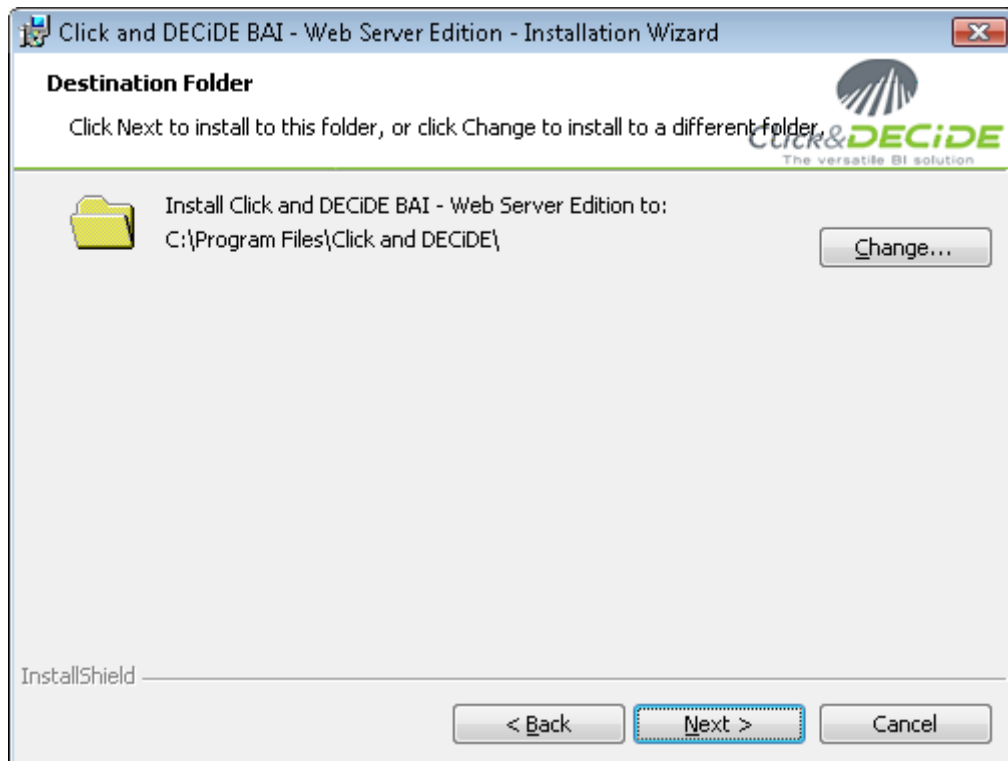


Select I accept the terms in the license agreement to continue.

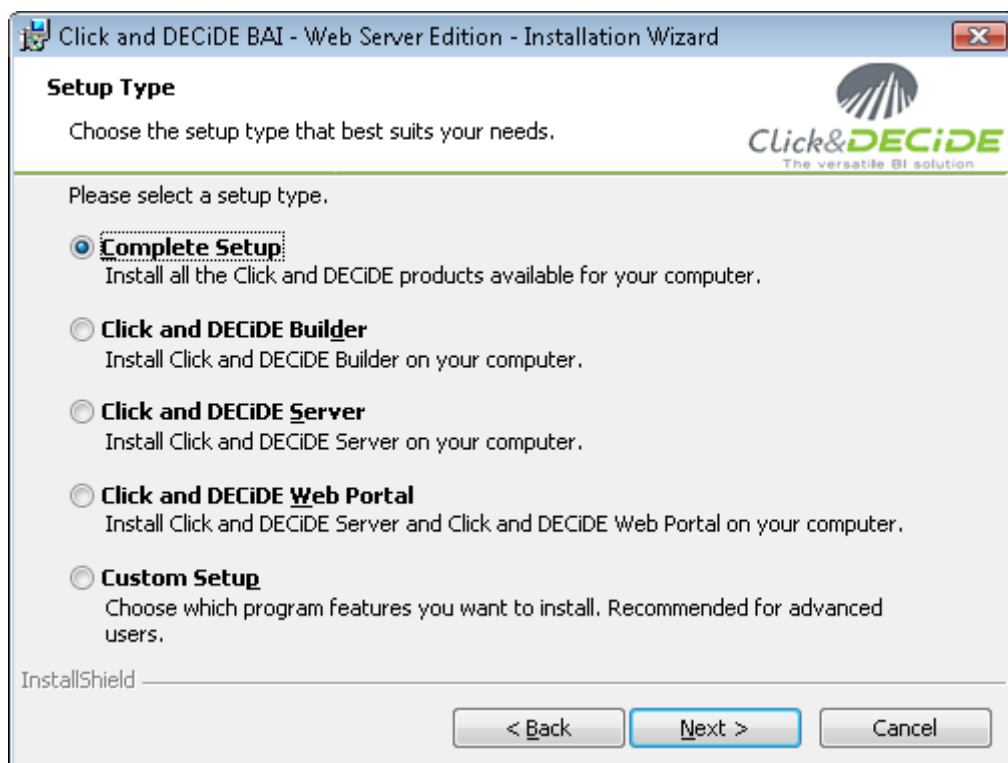
Click **Next>**.



Click **Next>**, or click **Change...** to install the software to a different folder.



Click **Next>** to install all the Click&DECiDE products or select the **Setup Type** that best suits your needs.

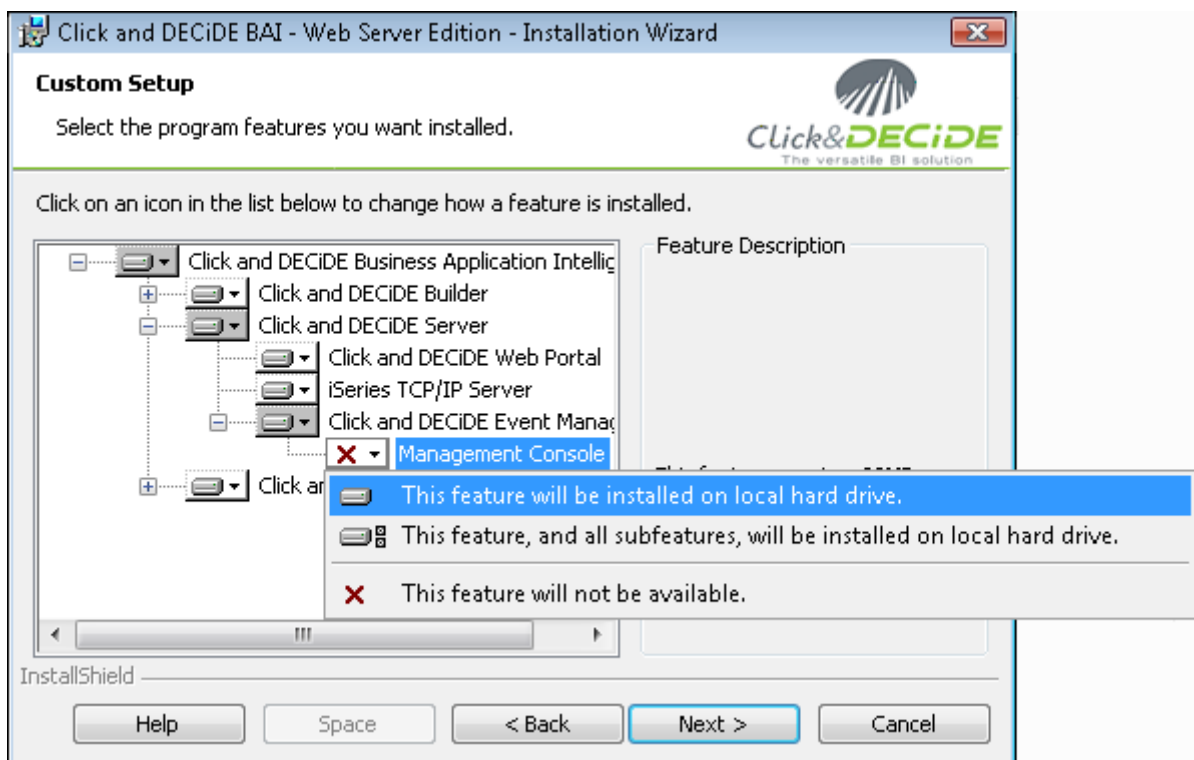


IMPORTANT NOTE

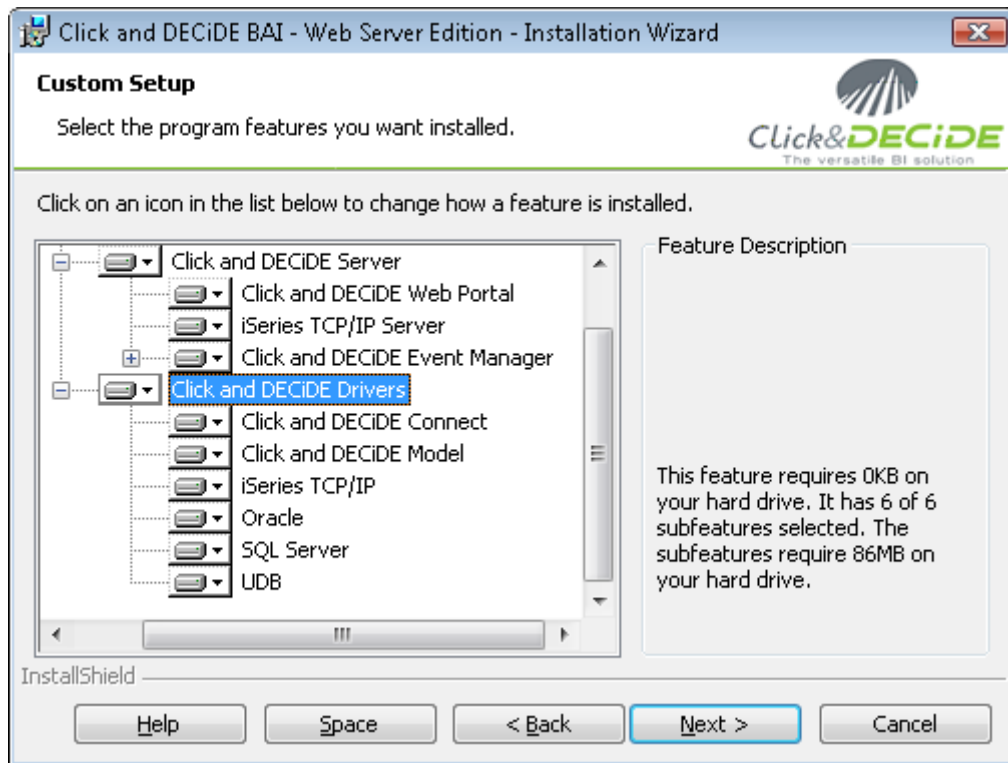
The **Management Console** is not installed by default. If you wish to install this component, perform the following steps:

1. Click Custom Setup.
2. Click **Next>**.
3. Select the Click and DECiDE Event Manager branch.
4. Select Management Console.
5. Select **This feature will be installed on local hard drive.**

Note: this module is reserved to the Administrator or Advanced Users. It can be used in relation with the Click and DECiDE Event Manager Engine, for Alert Management and Web Server Statistics.



Note: if you do not wish to install all the native database engines proposed by Click&DECiDE, then select the **Click and DECiDE Drivers** branch to view all the proposed data sources.



The following drivers can be installed:

Click and DECiDE Connect: the data source allowing a client workstation with only Click and DECiDE Builder to:

-Either: connect to a data source defined in the full Professional or Enterprise Edition installed on a Server,

-or create a data source in a Professional or Enterprise Edition installed on a Server but pointing to another server where a Professional or Enterprise Edition has also been installed.

Click and DECiDE Model: the data source allowing access to a Model defined with the Click and DECiDE Model tools (only available in the Enterprise Edition).

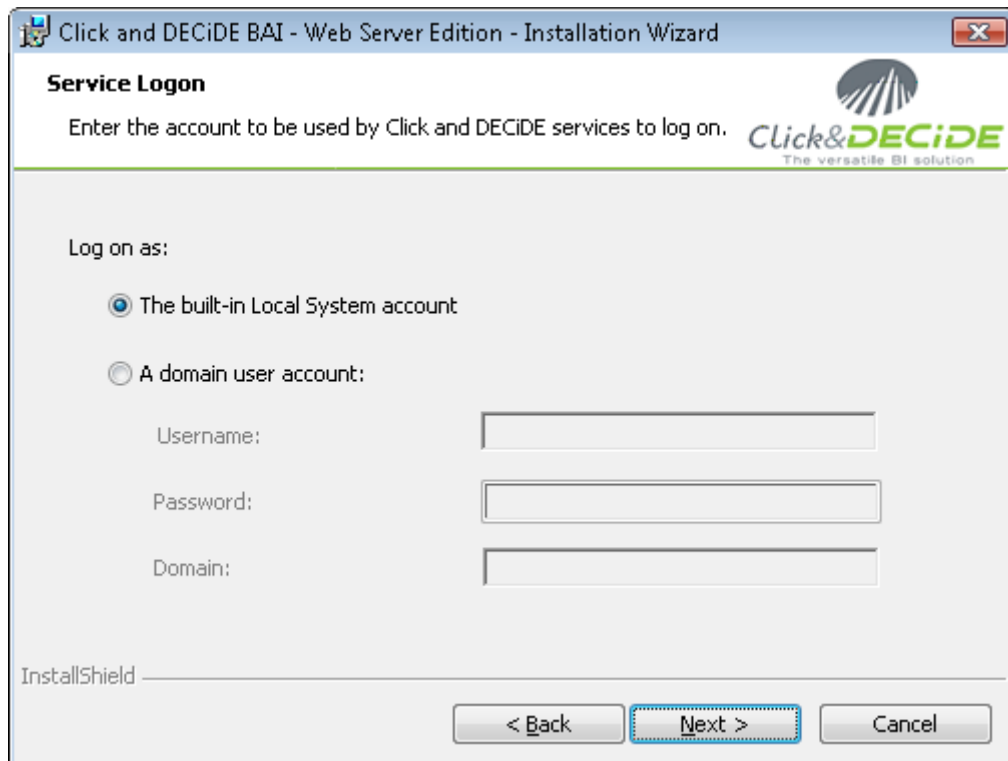
Click and DECiDE iSeries TCP/IP: the data source allowing access to an IBM iSeries machine (AS/400) using the TCP/IP protocol. **Note:** a Host Program must be installed on the AS/400.

Click and DECiDE Oracle: the data source allowing access to an Oracle database. **Note:** an Oracle client module must be installed first on the machine where Click and DECiDE is going to be installed.

Click and DECiDE SQL Server: the data source allowing access to an SQL Server database, installed by default when you install Click&DECiDE for the first time.

Click and DECiDE UDB: the data source allowing access to an IBM Universal Data Base (UDB/DB2). **Note:** an IBM UDB client module must be installed first on the machine where Click&DECiDE is going to be installed.

Click **Next>** to continue the installation. The **Service Logon** screen appears

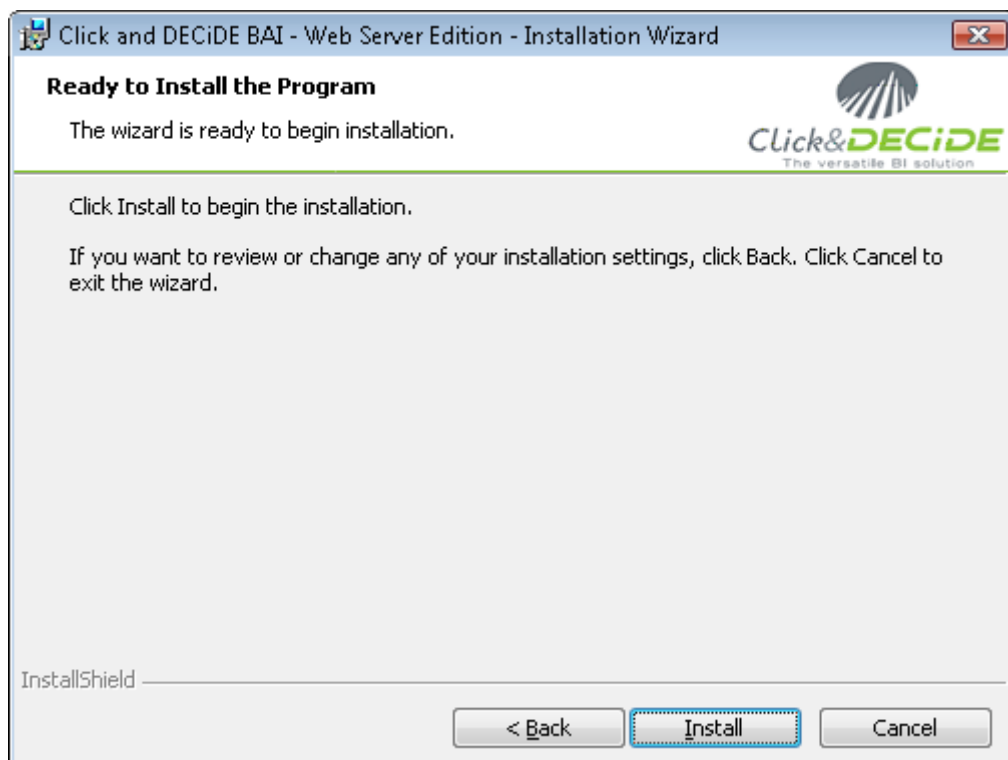


The built-in Local System account: by default, all Click and DECiDE services will run under The built-in Local System account.

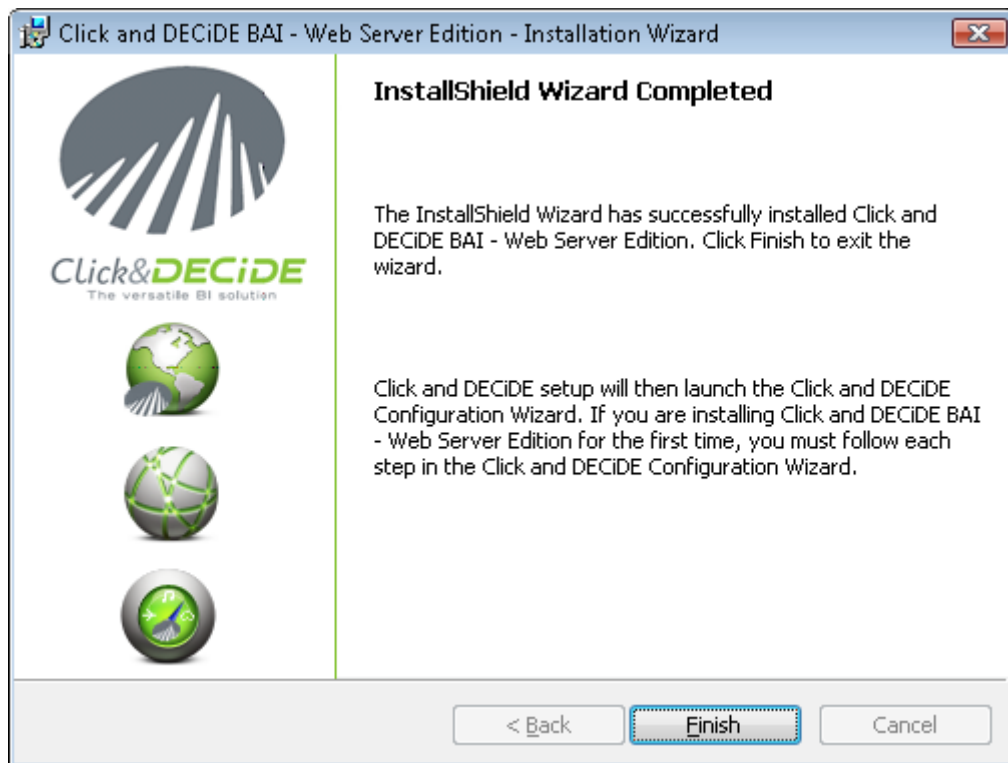
A domain user account: specify a domain user account if you wish to run the services under another profile.

Click **Next>**. The “Ready to Install the Program” message appears.

Click **Install** to launch the installation or **<Back** to modify a previous option.

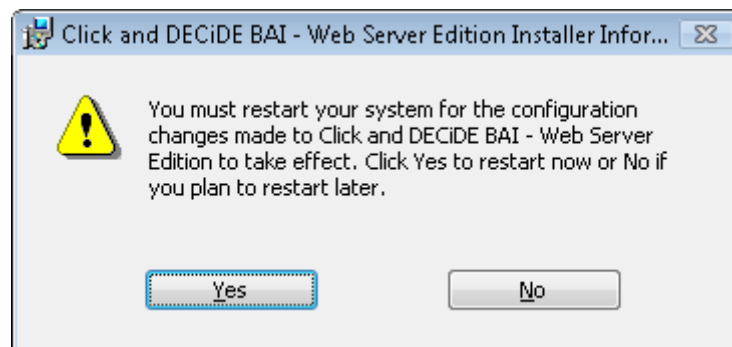


Note the following screen appears once all the programs have been installed.



Click **Finish**. A message will appear asking you to restart your computer.

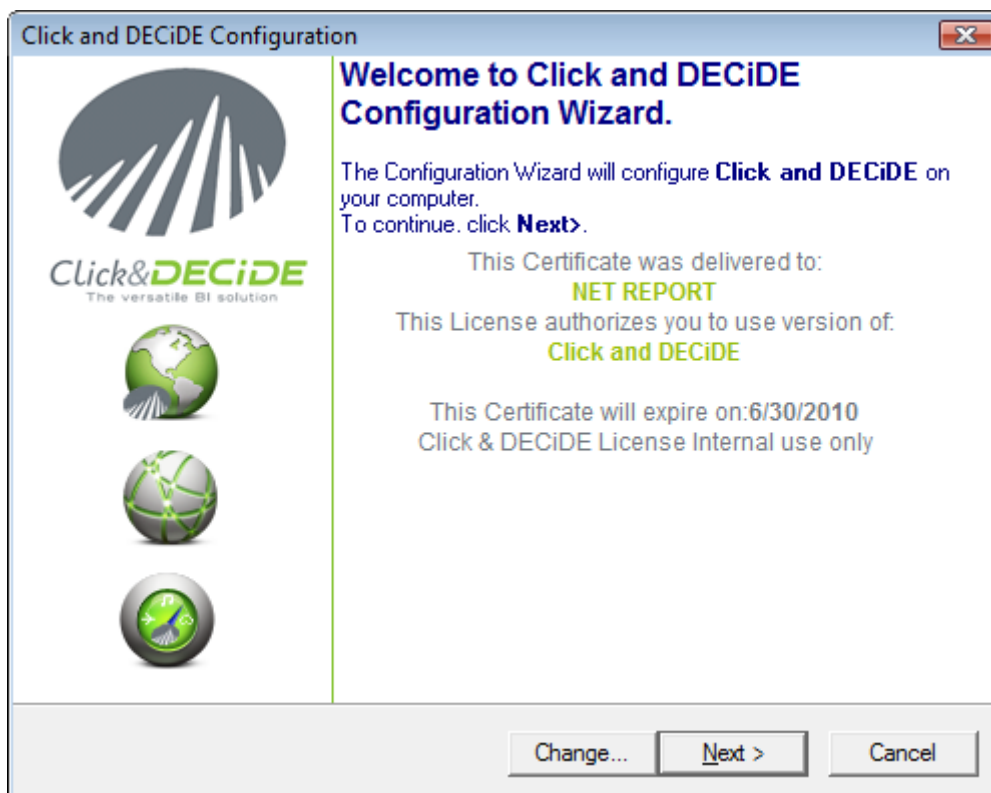
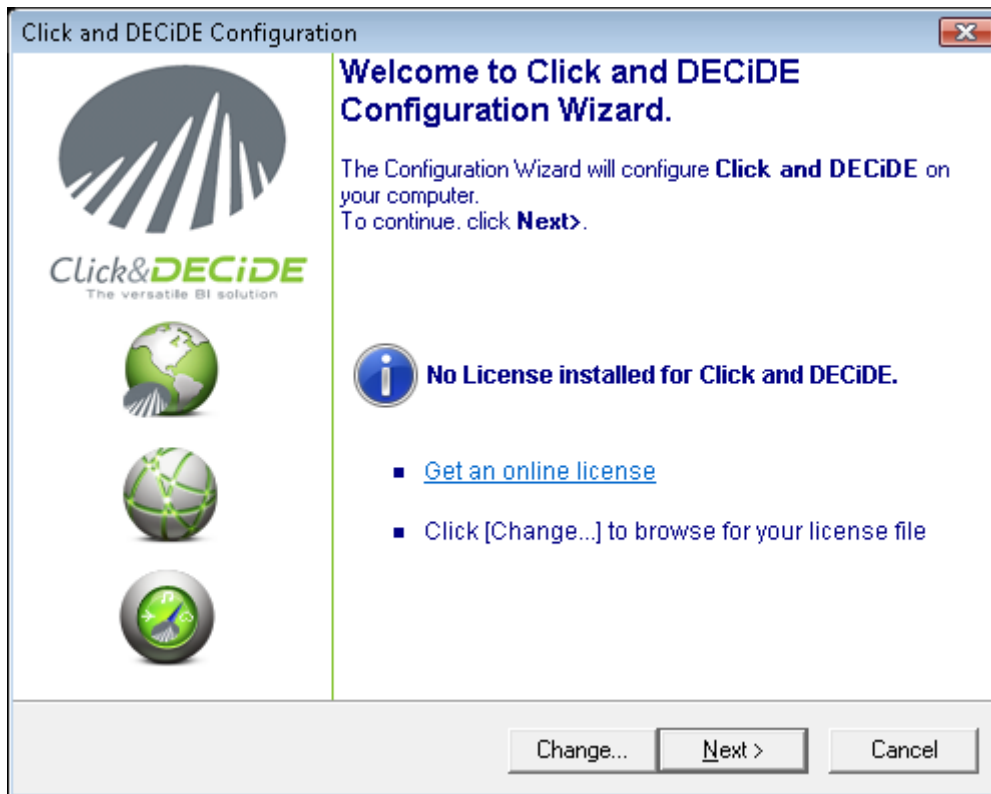
Click **Yes** if you wish to reboot now.



5.5. Running the Configuration Wizard

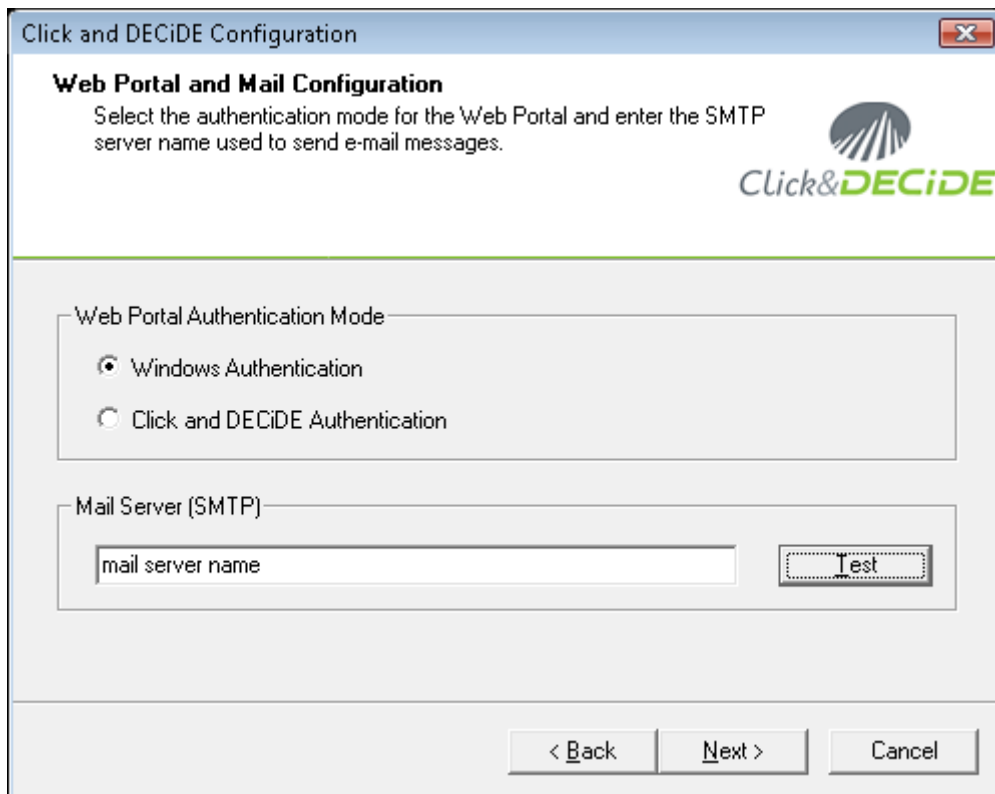
Once your computer has restarted, the Click and DECiDE Configuration Wizard will be launched automatically. Perform the following steps.

Click **Change...** to select your license certificate or click **Get an online license** if you do not have a license certificate file (license.d7cert):



Note the information concerning your license certificate will appear. In the example above, the license certificate displays information about your Edition, the version number, the number of CALs (Client Access Licenses) for the Click and DECiDE Builder, the number of CALs for the Web Portal and the number of Concurrent Users for the Web Portal. The certificate also displays information concerning whether you are under a Maintenance Agreement with the expiry date and displays the expiry date of the certificate if you do not have a permanent license certificate.

Click **Next>** to continue. The **Web Portal and Mail Configuration** screen appears.



Click and DECiDE Configuration

Web Portal and Mail Configuration

Select the authentication mode for the Web Portal and enter the SMTP server name used to send e-mail messages.

Web Portal Authentication Mode

Windows Authentication

Click and DECiDE Authentication

Mail Server (SMTP)

mail server name Test

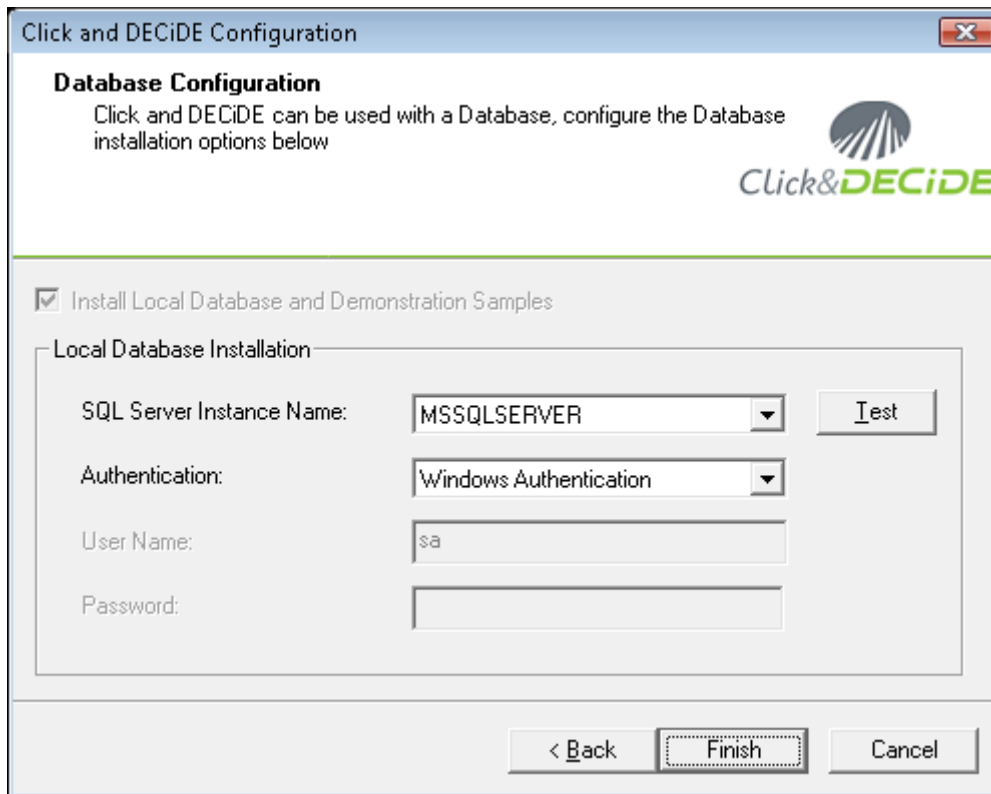
< Back Next > Cancel

Specify the **Web Portal Authentication Mode** you want to use.

Note: Windows Authentication is selected by default and Web Portal Authentication Mode is recommended by Click&DECiDE.

Specify the Mail Server Name

Click **Test** to check your Mail Server Name. Click **Next>**. The **Database Configuration** screen appears.



Click and DECiDE Configuration

Database Configuration
Click and DECiDE can be used with a Database, configure the Database installation options below

Install Local Database and Demonstration Samples

Local Database Installation

SQL Server Instance Name:

Authentication:

User Name:

Password:

< Back Finish Cancel

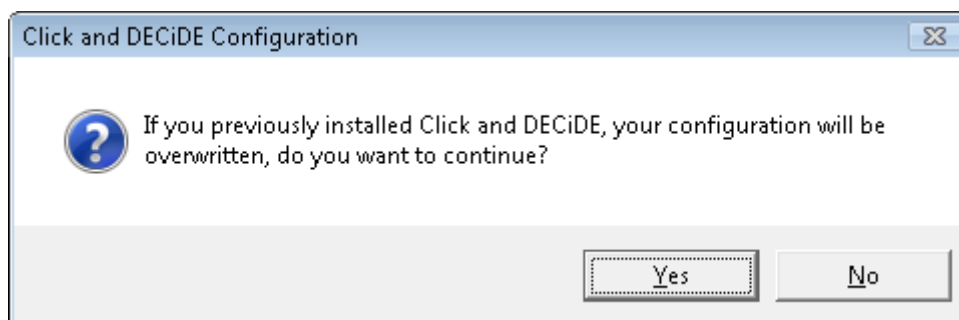
Note the **SQL Server Instance Name** is SQLExpress by default.

Note: the last step consists of inserting the required tables and the demonstration samples in the Local SQL Server. This step is mandatory because certain tables are required by the Alerts and Statistics Management module.


Select the Authentication Mode. For the SQL Server connection, choose between **Windows Authentication** and **SQL Server Authentication**.

Click **Finish** to terminate the setup.

Click **Yes** to continue.



Click and DECiDE Configuration

 If you previously installed Click and DECiDE, your configuration will be overwritten, do you want to continue?

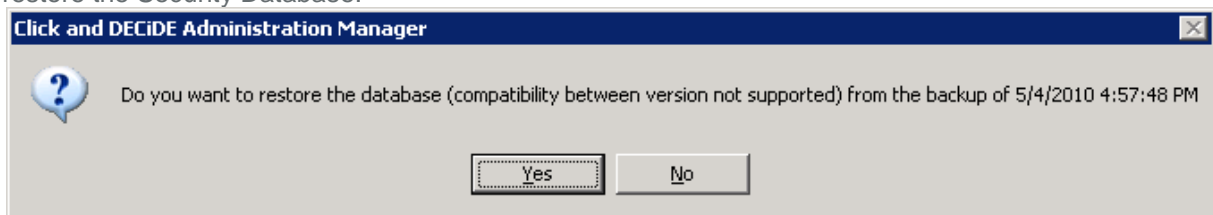
Click **Finish** to exit the configuration. The ReadMe file will be displayed.



6. Section 4: Restore your configuration

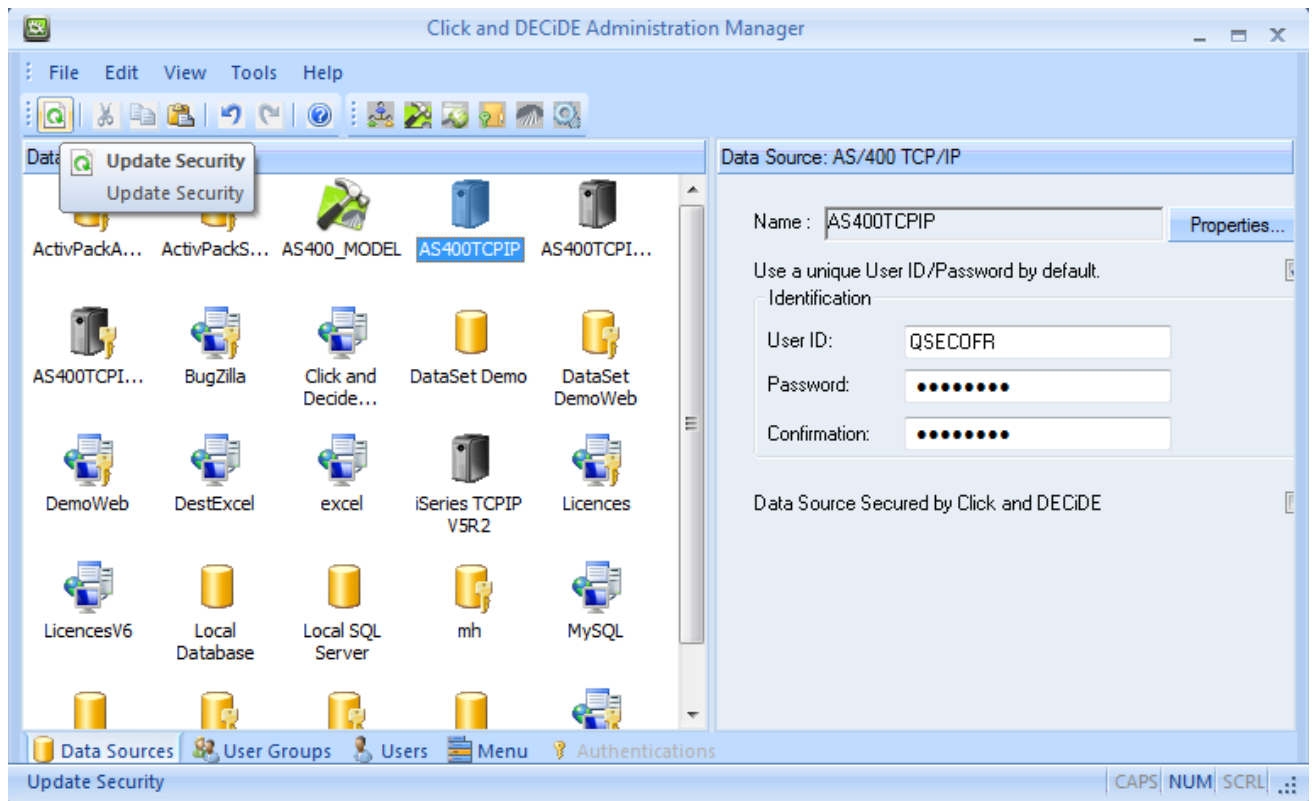
6.1. Restoring the Web Portal Configuration

1. Restore your own DataSet Vision projects (*.wfv files) created with the DataSet Vision or DataSet Report 2009 software's.
2. Restore the external files (for example, the pictures and ASCII List files *.lst if needed) used by your own DataSet Vision projects. **Warning:** if you have used an environment variable such as %D7VISION_PATH% or %DATASET_DEMO% with DataSet Vision, pointing to the default installation directory C:\Program Files\DataSet\DataSet Vision, the same environment variable with Click&DECiDE will point to the default directory C:\Program Files\Click and DECiDE\BAI. Make sure the pictures files or ASCII List files are in a correct location regarding the new environment variable. In any other case you could be obliged to check and change if needed all your path name in all your projects files (*.wfv, *.wfd, *.wmu etc.)
3. Restore your customized Web Menus in a location taking care about the environment variable used.
4. Locate the Security Database backup file (.bck) on your hard drive.
5. Double click on the file having the "bck" extension. **Administration Manager** will ask you if you want to restore the Security Database.

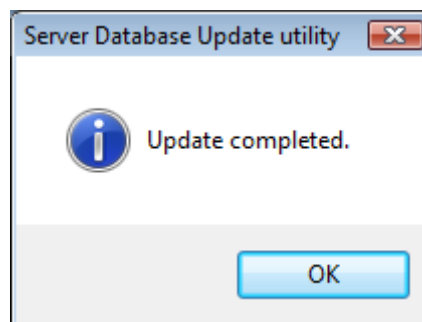


6. Click **Yes**.
7. Verify that your configuration is correct. You should see the same Data Sources Tab, the same User Groups Tab, the same Users Tab and Menu Tabs as before installing Click&DECiDE. Check for example the access to the Web Menu files to be sure they have been copied in the right location.

- Click **Update Security** icon



- Click **OK**.

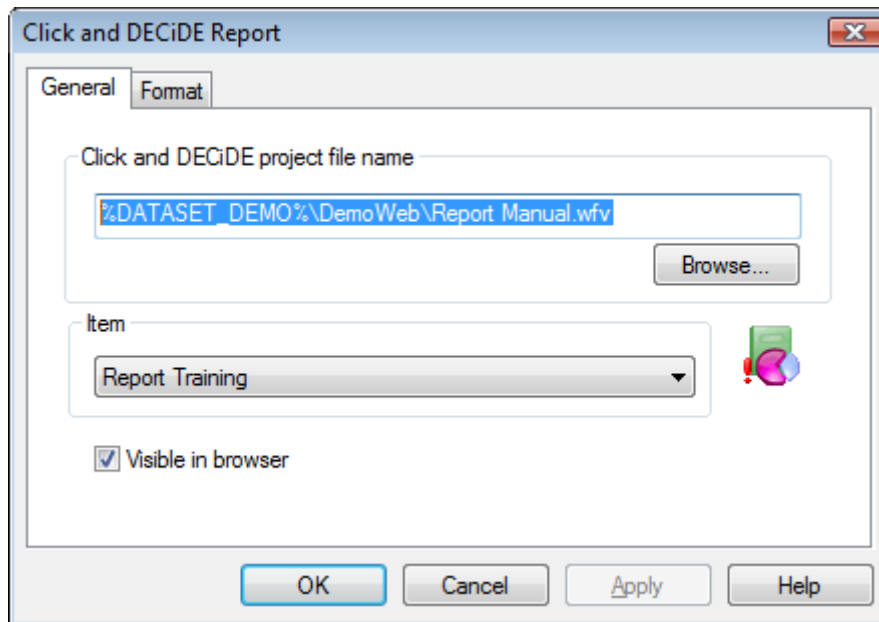


- Close** Administration Manager.

6.2. Restoring the Web Menu Buidler Files

Once you have restored the Web Menu Builder files (*.wmu), make sure the menus will still access to the DataSet Vision project files (*.wfv):

- Run the Web Menu Builder application.
- Open any Web Menu file you have restored (*.wmu).
- Open any branch pointing to a DataSet Vision project file (*.wfv).
- Double click on any item to display the Properties
- Check if the location path is still valid in the General Tab:



Click **OK** and **Save** the Menu file in case of any change.

6.3. Restoring the Scheduled Tasks

If you have very few scheduled tasks to be converted to Click&DECiDE, you will save time by creating new tasks through the Click&DECiDE Web Portal. (Recommended). Please refer to the Web Portal documentation for more information.

http://www.netreport.fr/downloads/WebDoc/BAI/ClicknDECiDE_BAI_Web_Portal_User_Guide.pdf

If you have many scheduled tasks to be converted to Click&DECiDE, the procedure is given here below, but this process requires an advanced knowledge of the product.

1. Stop the Click and DECiDE Task Manager Service.
2. Restore your own d7tasks.xml file in the C:\Program Files\Click and DECiDE\BAI directory.
3. Edit this file with any text editor.
4. Check the path to all the Builder Project files (*.wfv) if the new location has changed.
Example: `<visionproject>%DATASET_DEMO%\DemoWeb\DataSet DemoWeb.wfv</visionproject>`
5. Check the Menu Names and Menu IDs (if they have changed, replace with the new one).
Example: `<menualias>DemoWeb</menualias>` and `<menuitemid>2316</menuitemid>`
6. Check the path in all output destination file, such as the following example:
`<outfilename>%DATASET_DEMO%\DemoWeb\Demo Multi Criteria.pdf</outfilename>`
7. Replace the encrypted password with visible password (they will be again encrypted when starting later the Click and DECiDE Task Manager Service).
Example: `<password>ENC 03D2692384D99A8A3DC791337B68A585</password>`
8. Check the path for the location program running the tasks (d7RunTask.exe).
Replace:
`<program>C:\Program Files\DataSet\DataSet Vision\d7RunTask.exe</program>`
with
`<program> C:\Program Files\Click and DECiDE\BAI\d7RunTask.exe</program>`
9. As this row anywhere in the task: `<sendalert>0</sendalert>`.
10. Save the d7tasks.xml file thus modified.
11. Restart the Click and DECiDE Task Manager Service. All visible passwords will be encrypted again.

6.4. Restoring the Visual Basic Scripts

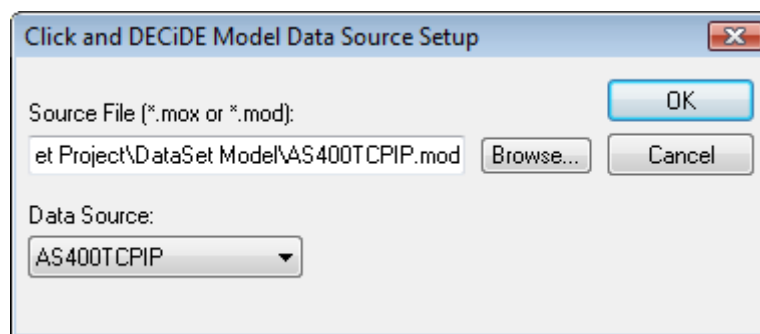
If you have created your own Visual Basic Script under DataSet Vision version 5.x and make a backup of all these scripts (*.vbs file):

1. Restore all the VBS files in the location of your choice.
2. Edit all the VBS files with a text editor.
3. Check all the paths that may have change between DataSet Vision and Click&DECiDE.
4. Save all the modified VBS files.

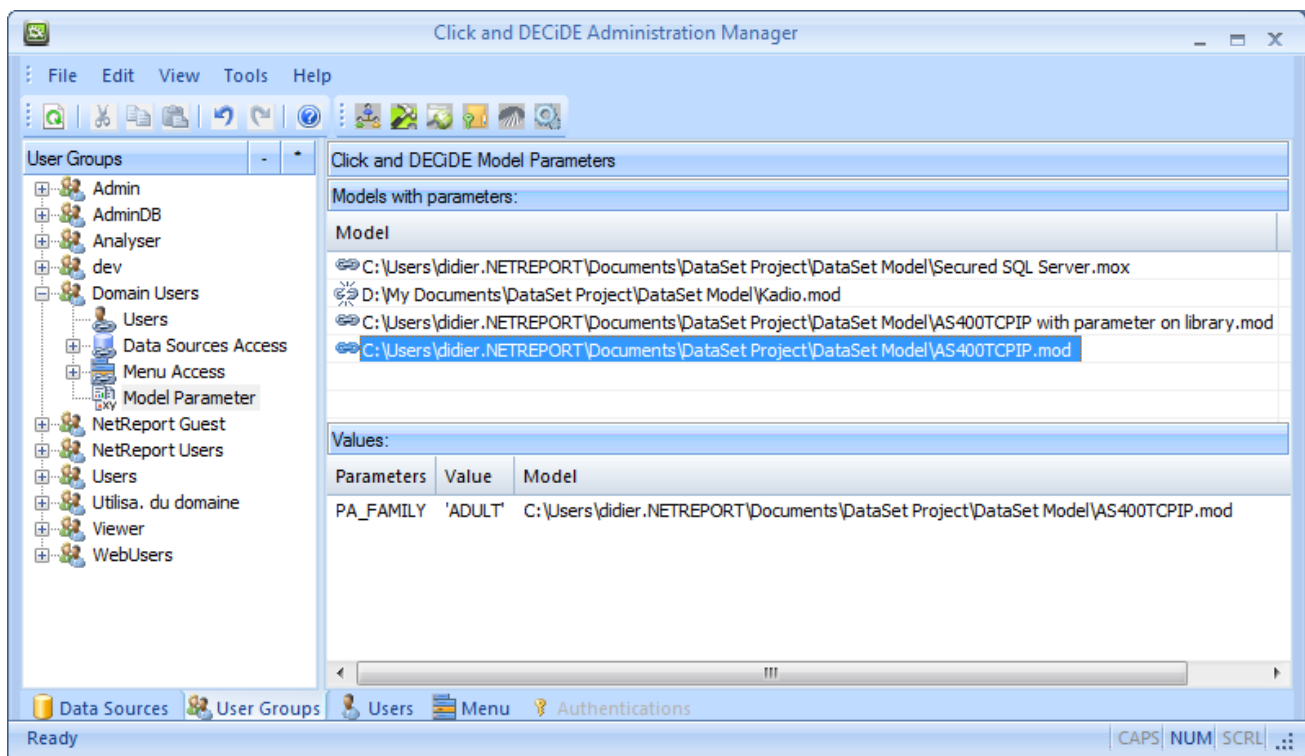
6.5. Restoring the DataSet Model Files

If you have used the DataSet Model software:

1. First check the Data Source Model restored in the Administration Manager and check if the path to the Model file is still correct (*.mod). Example:



2. Validate and test the connection to the specified data source.
3. If Model parameters have been used linked to User Groups or Users inside Administration Manager, check if the path to the Model files are still correct, example:



In the above example, a link to a Model file appears as broken because the Model file does not exist anymore.

The three other links appear as being correct.

6.6. Restoring the EBIS Application files

The **EBIS** Application files is now called Click&DECiDE **Dashboard** and concerns the files having the extension *.wfd. If you have used this application:

1. First restore the EBIS project files (*.wfd) in the location of your choice.
2. Then open each EBIS project file with the Dashboard application.
3. Check the path to the DataSet Vision project files (*.wfv) and to any picture file.

Note: if you have develop your EBIS project files using a relative path or an environment variable, it should work without any modification if the location of the DataSet Vision project files (*.wfv) and the pictures files are still correct.

A relative path was searching a DataSet Vision project file (*.wfv) or a picture file using the following syntax:
.\MyVisionProjectFile.wfv or .\MyPicture.jpg

If the Dashboard project file is still in the same directory as the DataSet Vision project file and the pictures used, it will work without any modification.

If not you should check all path accessing to a DataSet Vision project file or a picture file.

A path with an environment variable was searching a DataSet Vision project file (*.wfv) or a picture file using the following syntax:

%D7VISION_PATH%\DemoWeb\MyVisionProjectFile.wfv or %D7VISION_PATH%\Samples\MyPicture.jpg

%D7VISION_PATH% being the default directory installation: C:\Program Files\DataSet\DataSet Vision

With Click&DECiDE the same environment variable will refer to C:\Program Files\Click and DECiDE\BAI.
Make sure the access path is still valid with the Click&DECiDE product.

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