Report Exec Direct Update Checklist

1. Is an update needed?

- ✓ Report Exec Enterprise is very customizable and can be used slightly differently by each individual agency that uses it. As a result there are sometimes problems that only affect a few customers. We often have new versions of the program so you may not need an update.
- ✓ Check the current Release Notes to find out what the current version number is and to see what has been added to the program. The current version of your Report Exec system can be found on the Dashboard under **My Information > Check Version**, or by logging into the Admin side of the program.

2. Does your agency also use Report Exec Dispatch?

- ✓ Report Exec Dispatch is not used by every agency so you can skip this step if it isn't used.
- ✓ A user with proper permissions to install programs on your dispatch workstations will be needed. Sometimes this is an I.T. person, and other times any user is allowed to install programs.
- ✓ Report Exec Technical Support will provide the file needed for updating Dispatch when the update is scheduled with them.
- ✓ *If there is a mismatch in the version of Dispatch and the version of the Report Exec database due to client workstations not being updated, issues can be caused that prevent the Dispatcher from using the application.*

3. Plan a time for the update.

- ✓ Report Exec Support is available Monday – Friday, 8am – 4pm Central Time.
- ✓ Updating Report Exec Direct takes anywhere from 10 – 30 minutes. Report Exec Support generally advises 20 minutes.
- ✓ It is highly recommended to schedule the updates to the Report Exec system toward the beginning of the work week to ensure the availability of the Report Exec Technical Support Department, should assistance be needed.

4. Schedule the update with Report Exec Support.

- ✓ Call (414) 423-9800 option 2 or e-mail support@reportexec.com to schedule a time with a member of the Support Team.
- ✓ All users of both Enterprise and Dispatch will need to be logged out for the update.
- ✓ Updating Report Exec Direct takes anywhere from 10 – 30 minutes. Report Exec Support generally advises 20 minutes.
- ✓ Report Exec Dispatch can be updated during the 10 – 30 minute downtime, just refrain from logging in.
- ✓ Report Exec Support will send an e-mail, or call if preferred, to advise you that the update has been completed.

5. Notify all users to be logged out at the scheduled time.

- ✓ To avoid loss of data, and upset end-users, it is highly recommended to notify everyone to be out of the system at the time of the update. Users can easily be forced out, but they would lose any unsaved work.
- ✓ Standard patch updates typically take about 10 – 30 minutes to perform.