OSTENDO

One system . **Complete** operations

Ostendo Continuum Edition

Ostendo 242 to Continuum in a TCP/IP FB2.5 & FB5 “Test Environment”

17/07/2026

Revision 1.0.1

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1.Overview:

This document outlines the process for migrating a copy of an Ostendo Build 242 database in a TCP/IP environment to Continuum using Firebird 5 (FB5). The migration is intended solely for testing and evaluation purposes, allowing Continuum to be assessed without affecting the existing production environment. (Appendix 1 outlines the step involved when moving from a Test to a Live environment)

During this process, the existing Ostendo Build 242 Production database will continue to operate using TCP/IP and Firebird 2.5 (FB2.5), while the migrated copy will run under Continuum using Firebird 5 (FB5). This enables both environments to operate independently, allowing testing, validation, and familiarisation with Continuum before committing to a production migration.

To ensure there are no Firebird conflicts Firebird 2.5 will use its existing default port number (usually 3050). Firebird 5 will be configured to use port 3051.

Only 242 Databases can be migrated to a Continuum Editon database.

Remote Access:

All remote access to the server and Ostendo is handled via standard connection software such as Remote Desktop Protocol (RDP). No special configuration is required beyond TCP/IP connectivity.

Each local client machine must be configured with:

- A Mapped Drive pointing to the Ostendo database file on the server
- The Ostendo Client Configuration Utility, configured to point to the server database
- The Continuum Ostendo.exe installed

Firebird Rules

- Continuum requires Firebird 5 in a production environment
- Continuum may be run on Firebird 2.5 ***only*** when testing alongside a 242-production environment
- When multiple versions of Firebird are in use, each must use their own unique port. Typically, FB2.5 uses 3050 (*default*). Firebird 5 needs to be reconfigured to use a different port eg: 3051
- Version 242 must **NEVER** be run on Firebird 5

Pre-migration assumption

This document assumes the site will continue using 242 in its production environment while migrating a copy of the existing database to Continuum for testing purposes only.

The objective is to evaluate Continuum running on Firebird 5 without making any changes to the existing production TCP/IP infrastructure. The production environment will remain unchanged, continuing to operate with 242 and Firebird 2.5 throughout the testing period.

As the test environment will operate solely within the existing TCP/IP infrastructure, HTTPS protocol is not required for this deployment.

Precautionary Notes:

- This environment can place significantly greater load on the server, as it is required to run two different versions of Firebird concurrently. This may result in reduced performance and could give a misleading impression of Continuum's capabilities. For this reason, this configuration is generally discouraged unless the server has sufficient CPU and memory resources to comfortably support both environments.
- This environment requires standard remote access software, such as Remote Desktop Protocol (RDP), together with any associated licensing required to provide remote user access.
- All emailed reports will be sent as PDF attachments only. URL-based report delivery is not available in this environment.
- Linked documents may be stored on the local server and will be emailed as file attachments. Documents referenced by a URL will continue to be sent as URL links.
- Server-side background processing is not available in this environment. Processes such as Inventory Replenishment and As At Reporting will execute on the user's workstation, with the application remaining unavailable until the task has completed.

2.Prerequisites:

- Ensure you have a Continuum "Trial Licence Key" available prior to any Upgrade. Each Partners Development-X Continuum licence maybe used for trial purposes. A formal key is only required when the site goes into the Production Phase.

An Ostendo 242 Licence Key is not interchangeable with Continuum

3.Server Preparation:

- It is strongly recommended that no Ostendo users are currently logged on whilst these changes are made.
- Ensure you are logged onto the Server with appropriate Administrative privileges.
- It is recommended that prior to any migration that Firebird 2.5 service (Both FB Guardian and FB Server) be re re-started to ensure no current connections exist.
- **As with 242, the folder that contains any Ostendo database needs to be set with windows user profile restrictions preventing Read, Modify and Delete. Users are not required to have any of these permissions as Firebird controls this.**
- Stop the Ostendo API Rest Service
- Stop Ostendo Web Services
- Stop Ostendo Queue Services
- Ensure Windows Scheduled Tasks relating to Ostendo have been temporarily disabled.
- Create a copy of the Ostendo database file
    - To ensure no users access the current 242 database whilst you are making a copy of it,
        1. Temporarily rename the existing 242 Database to something else to prevent users from accessing that database during the next step
        2. Make a copy of the current Live 242 Ostendo Database and name it `243_2_5_Ostendo.fdb`
        3. Rename the live database from step 1 back to its original name

4.Setting up the Continuum Environment:

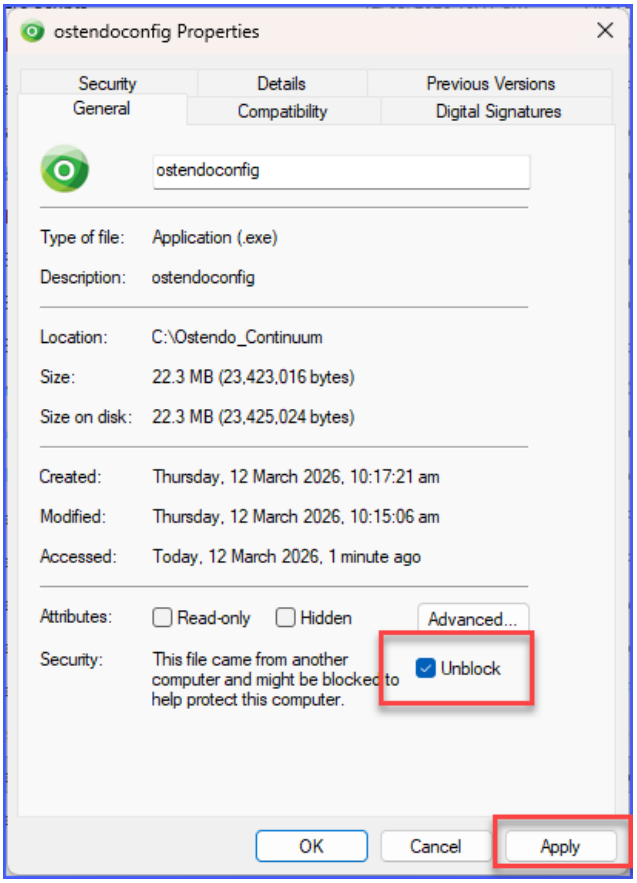
- Create a Folder on the server (`C:\Ostendo_Continuum`)
- Download the configuration utility from: https://www.ostendo.info/downloads/ostendo/ostendoremote.zip Save the file into your **`C:\Ostendo_Continuum`** folder
- Download the Firebird 2.5 and Firebird 5 fbclient.dll files. From https://ostendo.info/downloads/ostendo/FBClient2_5_and_5.zip
    - These are required when you are running both Firebird 2.5 alongside Firebird 5
    - Extract these files into you `C:\Ostendo_Continuum` folder

5.Extracting the Utility Files

- Open Windows File Explorer
- Browse to **`C:\Ostendo_Continuum`**
- Locate **`ostendoremote.zip`**
- Extract the contents into the same folder

6.Unblocking the Executable

- Locate **`ostendoconfig.exe`**
- Right-click and select **Properties**
- If the Unblock option appears, **tick** the checkbox
- Click **Apply**



7.Running the Configuration Utility

- Double-click **`ostendoconfig.exe`**
- Versions prior to 2026.1.1.23 of this utility required it to be run as Administrator. This is no longer required for version 2026.1.1.23 and later.

8.Updating Utility Components

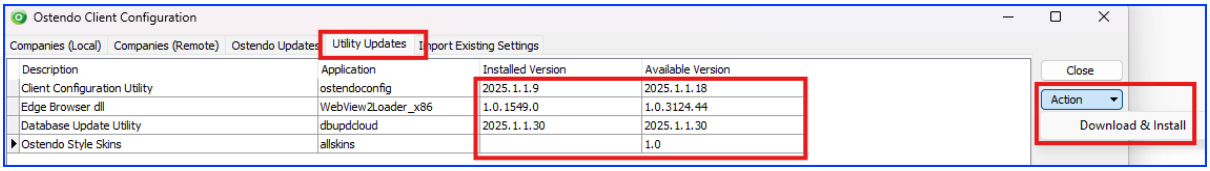
Open the Utility Updates tab and install updates if required.

a. Database Update Utility

b. Edge Browser DLL

c. Client Configuration Utility

d. Ostendo Style Skins

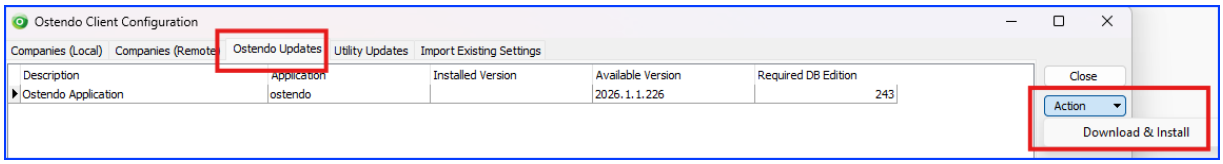


9.Downloading the Latest Ostendo Client

• Open the **Ostendo Updates** tab

• Select **Action**

• Click **Download & Install** The client will download to the `C:\Ostendo_Continuum` folder.



10.Creating the Desktop Shortcut

- Browse to **`C:\Ostendo_Continuum`** folder
- Locate **`Ostendo.exe`**
- Create a desktop shortcut
- Rename the shortcut to **'Ostendo Continuum'**

11.Datascreens Setup

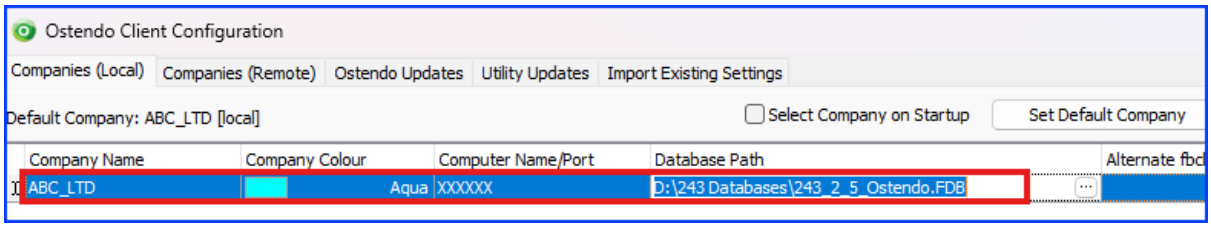
- Copy the Ostendo.exe application file in C:\Ostendo_Continuum
- Rename the copy to **`Datascreens.exe`**
- Create a Desktop shortcut called **‘Ostendo Datascreens’**

12.Configure Local Company Connection

Relaunch the Ostendo Client Configuration Utility (run as Administrator) if not already running and navigate to the Companies (Local) tab

> The Client Configuration Utility is **NOT** used to control 242 database Companies. Those are still maintained via the Multiple Companies option within 242

- Press the Add button
  - Complete the company details as follows:
    - **Company Name:** Enter an appropriate Company Name (no spaces)
    - **(Optional) Colour:** Choose the colour to easily identify this database band (For ease of identification ensure this colour is different to that specified for any 242 databases)
    - **Computer Name/Port:** Type in the actual Server Name. (As there is only one instance of Firebird currently installed you can omit the port
    - **Database Path:** Browse and select the database `243_2_5_Ostendo.fdb` you intend to upgrade
  - Press **Save** to confirm and store the configuration
- If there is only one database involved, Tick the Select **Company on Startup** option.



13.Upgrade Preparation:

- Copy all Custom Reports from the existing Ostendo\Reports\Default folder
  - Do this by copying the Default folder (or named folder containing the relevant Custom Reports) to your `C:\Ostendo_Continuum` folder
  - Rename this Default folder to "Reports"
- Copy all Graphical Views (eg: Workflows, DataScreens) from your existing 242 folder to your `C:\Ostendo_Continuum` folder.
  - If your custom views are in a folder called "Workflows" in the 242 Ostendo folder, then ensure that same folder exists in your Continuum folder.
  - Base Workflows – Copy the Base Workflows from the 242 Ostendo folder into your `C:\Ostendo_Continuum` folder. (Do not put them in the Workflows folder)

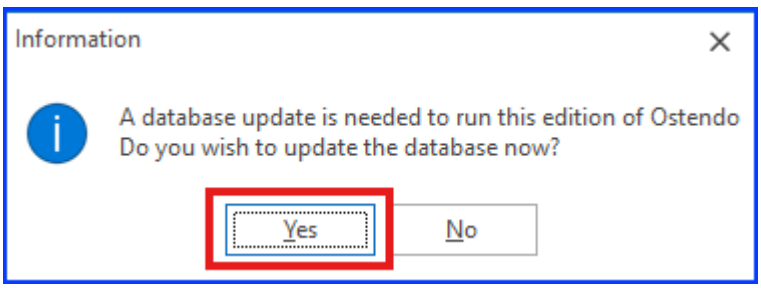
14.Upgrade Process

Launch Ostendo

- From your desktop, launch **Ostendo Continuum** from the icon you previously created.
- Log into the database.

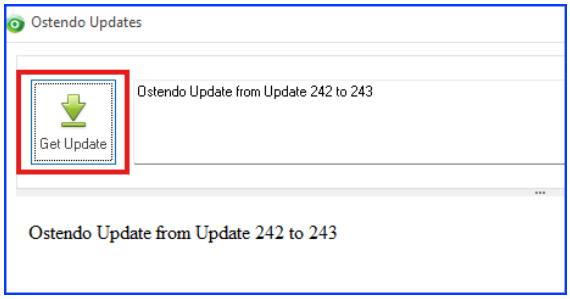
Update the Database

- Upon logging in you will be prompted to Update the database
  - Select Yes to proceed



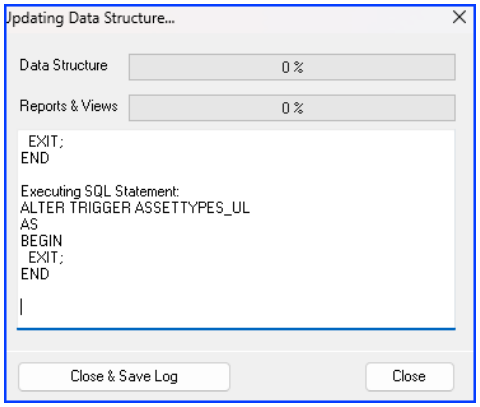
Applying the Ostendo Update

- Press Get Update to continue

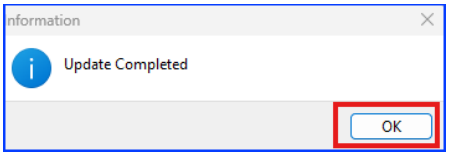


- The `dbupdcloud` application will then be invoked
- Answer **Yes** to the prompt to continue

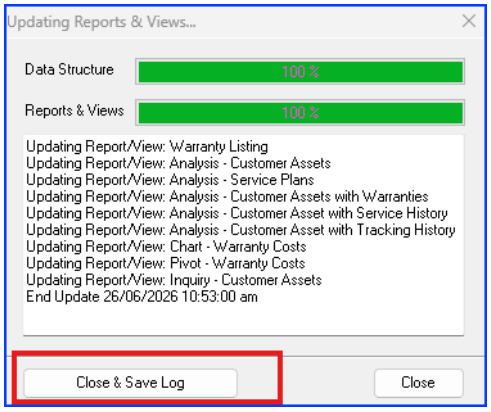
  The Update process will now begin



- Once the upgrade process has completed a popup screen will be displayed.
  - Answer OK to continue



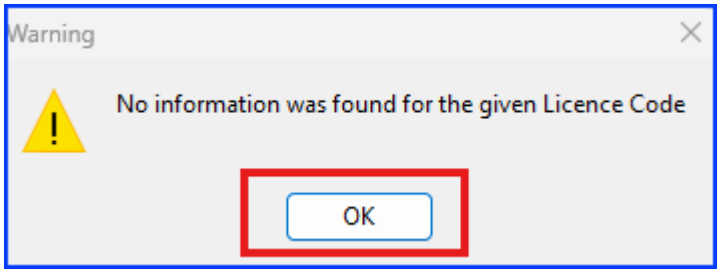
- Press the Close & Save Log button and save the file in your Continuum folder with an appropriate name relating to the database



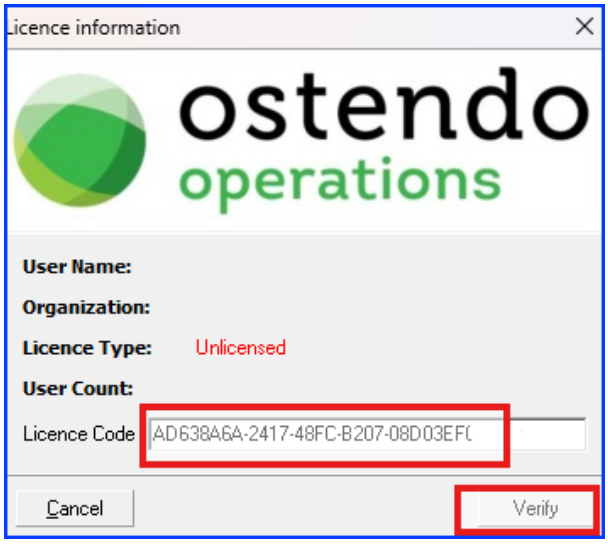
15.Post Update Tasks

Applying a new Licence Key

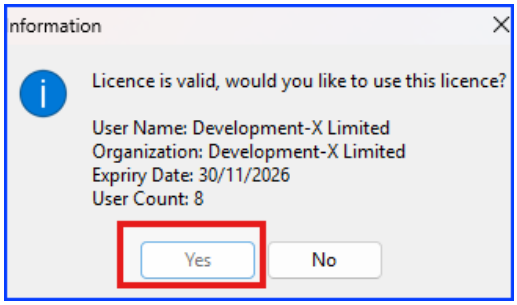
- Launch Ostendo Continuum from your desktop icon. Upon accessing this database you will be prompted for a new Licence Code. Answer OK



- Copy the Licence Code provided earlier and paste it into the Licence Code field to replace the contents entirely, then press the **Verify** button



- A confirmation screen with be displayed showing the licence details. Press **Yes** to continue



- Ostendo will now launch and you will be prompted for you username and password to continue

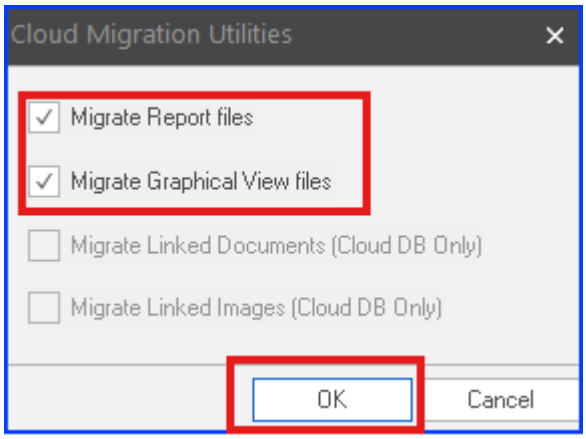
Migrate Custom Reports and Graphical Files

- Navigate to:
  File → System Configuration → Cloud Migration Utilities

- Select both:

  - **Migrate Report Files**
  - **Migrate Graphical Files**
  - **Migrate Linked Documents and Image options are greyed out because these are not available in a TCP/IP environment**

- Press **OK** to import all custom report layouts and graphical files (e.g., workflows) into the updated database.



Handling Workflows with {AppPath} References

- If any user workflows are configured with **{AppPath}** paths, a **warning message** will be displayed.

- If this message appears, it means the workflows need to be copied into your Continuum folder. If you haven't done this yet, select **No**, copy the workflows, and then repeat this process

16.Confirmation of Migration Process

- From within Ostendo Continuum,

Custom Report Layouts

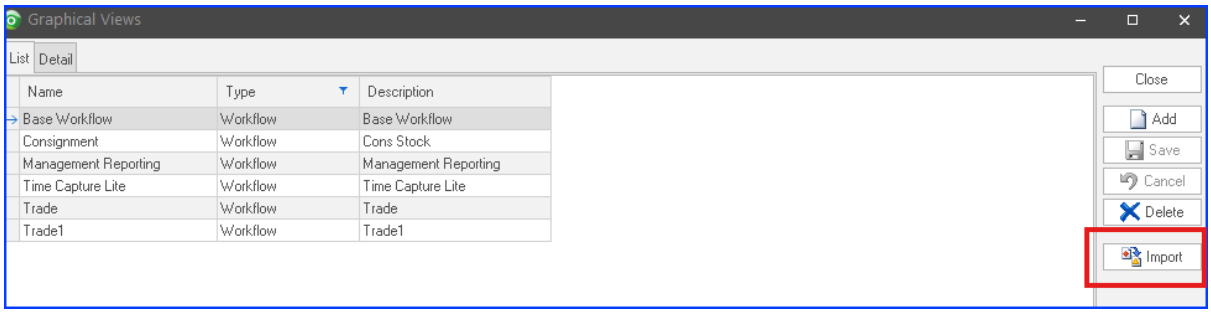
- Ensure the report layouts have now been all imported by running some reports/ forms to ensure the correct layouts are being loaded
- Navigate to File-> Reporting Configuration -> Specific Report Layouts to ensure the File Name and Email Form File Name have been replaced with the correct Layout Names. Update if necessary.

Orphaned Report fr3 files

In some environments, standalone fr3 files have been developed for Reports allowing the user to select the layout when they run reports. These layouts would not have been migrated; therefore these must be manually imported from File -> Reporting Configuration -> Report Layouts one at a time, using the Tools button -> Import (.fr3)

Graphical Views / Workflows

- Ensure all Workflows were migrated
    - Navigate to File->Customisation Configuration -> Graphical Views and check that all Workflows have been imported. You may manually import single Graphical Views directly from this screen, if some are missing.



    - Navigate to User Security and Options -> Workflows for each user and determine the Graphical View name has replaced the file path. If the file path still exists, manually select the appropriate workflow

17.Installing Firebird 5 Whilst Retaining Firebird 2.5

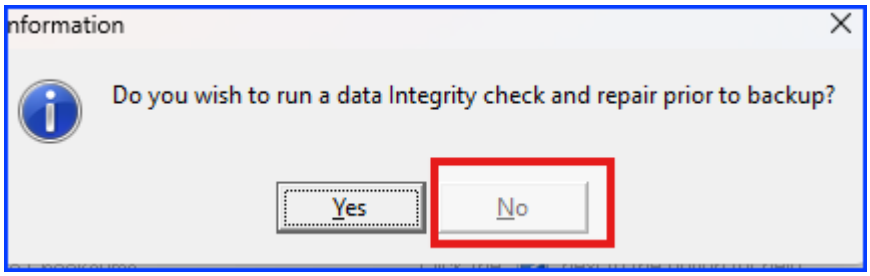
In a 242 production environment, you must only ever connect to Firebird 2.5 therefore this environment will remain unchanged.

Continuum will connect to Firebird 5.

This section describes the process of migrating a Continuum Database from Firebird 2.5 to Firebird 5 whilst leaving the 242 Production database connecting to Firebird 2.5

18.Process

- Create a Firebird 2.5 backup (`.fbk`) of the new Continuum Database from `243_2_5_Ostendo.fdb`. This can be done either at a command line level or by using the dbutils.exe utility within the 242 Ostendo folder. If using the dbutils.exe utility, do not select the option to run the data integrity check and repair option when prompted. Name the backup file `243_2_5_Ostendo.fbk`



19.Set up Firebird 5

- Search for the latest version of Firebird 5.0. At the time of this writing the latest is at: https://www.firebirdsql.org/en/firebird-5-0/

- Create a new folder on the server called `C:\Firebird\Firebird_5`

- Download the latest **64 bit Windows Zip Kit for Manual/Custom Installs** into the above Folder. `C:\Firebird\Firebird_5`

- Unzip all files in the Zip file to this folder

- Download http://ostendo.info/downloads/ostendo/SECURITY5.zip

- Unzip this file into your Firebird 5 folder (overwriting the existing SECURITY5.FDB file) (This file stores the Database User and Master Password, currently set to the default vales). This can be modified if necessary by *advanced users* using isql from within the Firebird 5 Folder)

- From within the Firebird 5 folder, edit the `firebird.confg` file and amend the following:

    - Change From: `#RemoteServiceName = gds_db`
    - To: `RemoteServiceName=fb_5`
    - Change From: `#RemoteServicePort=3050`
    - To: `RemoteServicePort=3051`

- Add a Windows Firewall Inbound and Outbound exception for port 3051

- Launch the DOS Command Prompt (Run as Administrator)

- Path to your FB5 folder eg: **`cd C:\Firebird\Firebird_5`**

- Run the following. **`instsvc install -auto -guardian -name fb_5`**

- Run the following. **instsvc start -name fb_5**

- **Run Windows Services and check that both Firebird versions are running**

    - **2.5 Firebird Guardian - DefaultInstance (***This may not exist if installed as Superserver***) and**
    - **2.5 Firebird Server – DefaultInstance**
    - **5 Firebird Guardian – fb_5**
    - **5 Firebird Server – fb_5**

20.Restoring a 2.5 Backup as a Firebird 5 Database

- Type **cmd** in **navigator bar – Run as Administrator**
- Navigate to your Firebird 5.0 Folder (e.g. cd\Firebird\Firebird_5_0\) from within the Command Prompt window
- Restore the backup using gbak command

```
gbak -create -verbose -user SYSDBA -password masterkey
c:\Ostendo\Database\243_2_5_Ostendo.fbk
c:\Ostendo\Database\243_Ostendo.fdb
```

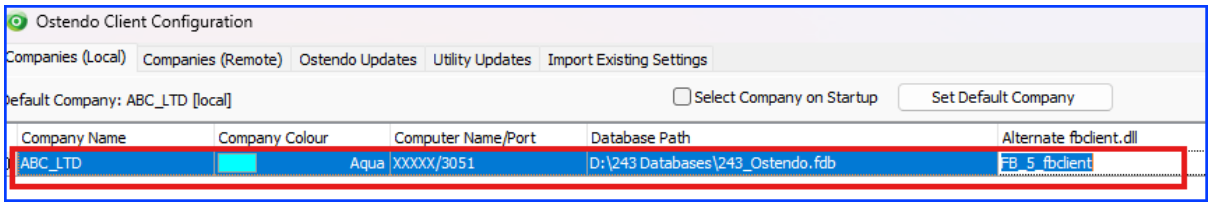
21. Post Upgrade Tasks

- Rename the `Live_242_Ostendo.fdb` back to its original file name so that 242 can connect to it in the next steps.

22.Reconfigure The Local Company Connection

Relaunch the Ostendo Client Configuration Utility if not already running and navigate to the Companies (Local) tab

- Amend the following entries:
    - **Computer Name/Port:** Type in the actual Server Name/Port Number. Eg: **Server Name/3051** (As there are now two instances of Firebird you must define the respective ports specific to the database you are connecting to. Because we are now using FB5 with Port 3051 we must define that port number
    - **Database Path:** Browse and select the database `243_Ostendo.fdb`
    - **Alternate fbclient.dll:** Type in FB_5_fbclient.dll
  - Press **Save** to confirm and store the configuration
- If there is only one database involved, Tick the Select **Company on Startup** option.

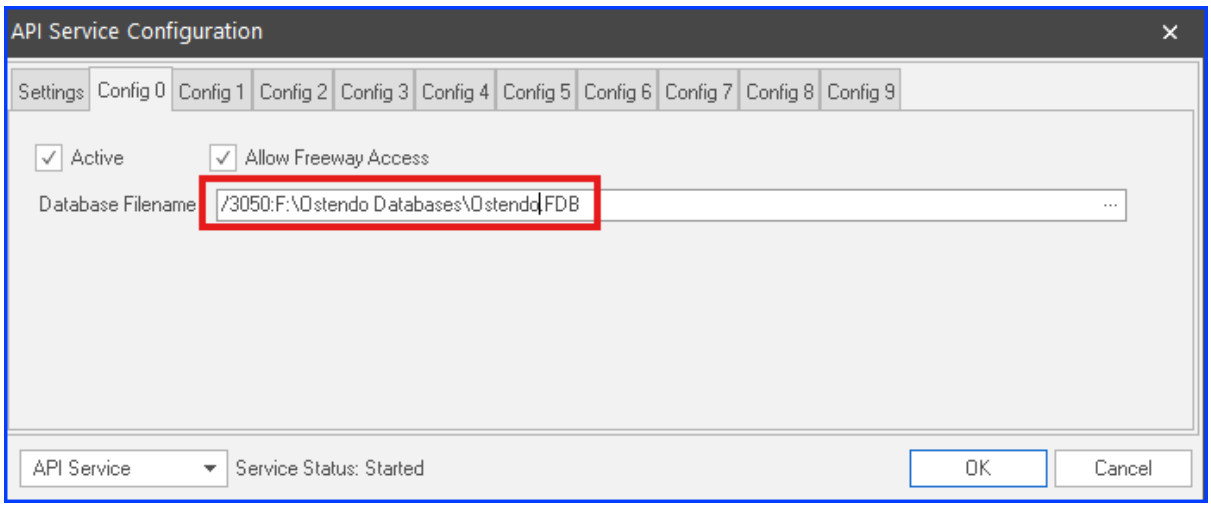


23.Amending 242 Ostendo API Service

As you are now using two separate instances of Firebird, you must define the Firebird 2.5 port in the Ostendo 242 Version.

> If there are multiple Live instances of the API, ensure you modify each .ini instance separately.

- Log onto Ostendo 242
- Navigate to File-> API Service -> API Configuration
- Add a '/' and the Firebird 2.5 **port number and ':'** to the Database path as indicated below. (replace database location as necessary)
  Eg: **/3050:**F:\Ostendo Databases\Ostendo.fdb



- Restart the 242 Ostendo API Service

24.Restart Other Services

- Start Ostendo 242 Web Services
- Start Ostendo 242 Queue Services
- Re-enable any Windows Scheduled Task that were disabled

25.Optional Setup of an API Service Against a Continuum Database

If you wish to test setup an API service to connect to your Continuum Database in an environment where you already operate the API connection to a 242 Database, you will need to create a new API instance within the **242 Ostendo folder**, just as you would for another 242 API instance. Refer to this document for more information relating to multiple API instances

https://ostendo.info/downloads/ostendo/Multiple_Ostendo_API_Instances.pdf

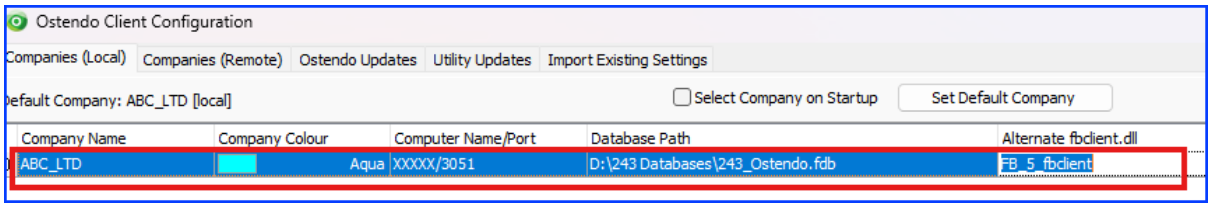
26.Client Desktop Setup

- On each Client machine requiring access to Continuum, create a folder (`C:\Ostendo_Continuum`)
- Download the configuration utility from: https://www.ostendo.info/downloads/ostendo/ostendoremote.zip Save the file into your **`C:\Ostendo_Continuum`** folder
- Copy across the `FB_5_fbclient.dll` from the server `C:\Ostendo_Continuum` folder. Or re-download from http://ostendo.info/downloads/ostendo/FBClient2_5_and_5.zip
- Follow Step 5 thru to Step 11 in this document to configure the connection.
- Relaunch the Ostendo Client Configuration Utility if not already running and navigate to the **Companies (Local)** tab

> The Client Configuration Utility is **NOT** used to control 242 database Companies. Those are still maintained via the Multiple Companies option within 242

- Press the Add button
    - Complete the company details as follows:
        - **Company Name:** Enter an appropriate Company Name (no spaces)
        - **(Optional) Colour:** Choose the colour to easily identify this database band. (For ease of identification ensure this colour is different to that specified for any 242 databases)
        - **Computer Name/Port:** Type in the actual Server Name/Port Number. Eg: **Server Name/3051** (As there are now two instances of Firebird you must define the respective ports specific to the database you are connecting to. Because we are now using FB5 with Port 3051 we must define that port number here.

        - **Database Path:** Browse and select the database `243_Ostendo.fdb`
        - **Alternate fbclient.dll:** Type in `FB_5_fbclient.dll`
    - Press **Save** to confirm and store the configuration
- If there is only one database involved, Tick the Select **Company on Startup** option.



Appendix 1 – Production Phase

Moving from a Continuum Test TCP/IP environment to Production:

Overview:

Once testing has been completed and signed off by the Ostendo site, a Production Implementation can take place.

Given the infrastructure is now in place on the same server, the production phase follows a similar path to that followed when preparing for the test phase.

Production Upgrade Steps

The following Steps will guide you through this process:

- Ensure you have a new Continuum Live Licence Key from Development-X. Email liz@development-x.com to request this key. Please allow at least two working days notice for this request.
- It is strongly recommended that no 242 Ostendo users are currently logged on whilst these changes are made.
- Ensure you are logged onto the Server with appropriate Administrative privileges.
- It is recommended that prior to any migration that Firebird 2.5 service (Both FB Guardian if configured and FB Server) be re re-started to ensure no current connections exist.
- Stop all Ostendo API, Queue Service and Web Services
- Ensure no Windows Scheduled Tasks relating to Ostendo have been temporarily disabled in Step 3
- Rename the current 242 Ostendo database to `Live_242_Ostendo.fdb`
- Custom Report Files `.fr3` file preparation. (Step 13)
- Upgrade Process Proceed to Step 14 though to Step 16
- Create a Firebird 2.5 .fbk of the Live `242_Ostendo.fdb` (Step 18)
- Restore Backup using Firebird 5 name this `243_Ostendo.fdb` (Step 20)
- Move the restored database `243_Ostendo.fdb` to its preferred location on the server.
- Reconfigure the Ostendo API Service if necessary.

    - Amend the ostendoapi.ini file(s) as necessary to ensure the Firebird 5 Port number (eg: /3051:) is prefixed to the database file path.
    - Restart the Ostendo API Service used for the Continuum Database.
    - Check the Service remains Running
- Uninstall Queue and Web Services (if configured) from the 242 Ostendo folder.
- If Queue Services is to be used, this must be setup and run on the either a dedicated client machine or Server itself. Refer to this document for more information.
- Post Upgrade Tasks
    - Deploy the Continuum Client Configuration Utility and the Configuration files to Client machines not already setup. (Step 26).
    - Any Client machines that had previously been configured for Continuum in the Test Phase must have their **Companies (Local)** record amended eg: **Company Name**
    - Preventing the use of Ostendo 242
        - Launch the Services screen and **Stop** the 2.5 Firebird Guardian (if configured) and the Firebird Service itself.
        - Also from within this screen amend the *Properties* for each FB2.5 Service so their *Start Up Type* is set to '**Manual'**
        - From with the Ostendo 242 folder, rename the Ostendo.exe to `242_ostendo.exe`
        - From each client machine, 'Uninstall' Ostendo 242 so this is no longer accessible.
- Log onto Continuum to setup the Email Service Refer the appropriate document below:
    - Amazon Web Services Simple Email Service (SES)
    - Microsoft 365 (via Microsoft Graph)