

BusinessObjects Enterprise

Using the Import Wizard to migrate Business Views from BusinessObjects Enterprise XI to Enterprise XI Release 2

Overview

Using the Import Wizard is the recommended best method of migrating Business Views from BusinessObjects XI to BusinessObjects XI Release 2 deployments. This document provides the steps and options to select to perform this successfully.

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Introduction

The Import Wizard is recommended for migrating Business Views and their associated reports from BusinessObjects Enterprise XI to BusinessObjects Enterprise XI Release 2. This document describes what options should be selected in a systematic procedure to perform this successfully.

Things to consider when migrating Business Views

Whether they were created within the Business View Manager, or automatically when a dynamic prompt was created within Crystal Reports, all Business Views contain the same objects: Data Connection, Data Foundation, Business Elements, Business View, and any List of Values prompts. These objects are dependent upon each other, and must be migrated in order for the reports that use them to work successfully on the destination system

Business Views have multiple layers of security throughout their objects; for this reason it is recommended to maintain security during the migration. In order to do this, it is mandatory that you migrate the users and groups when migrating Business Views.

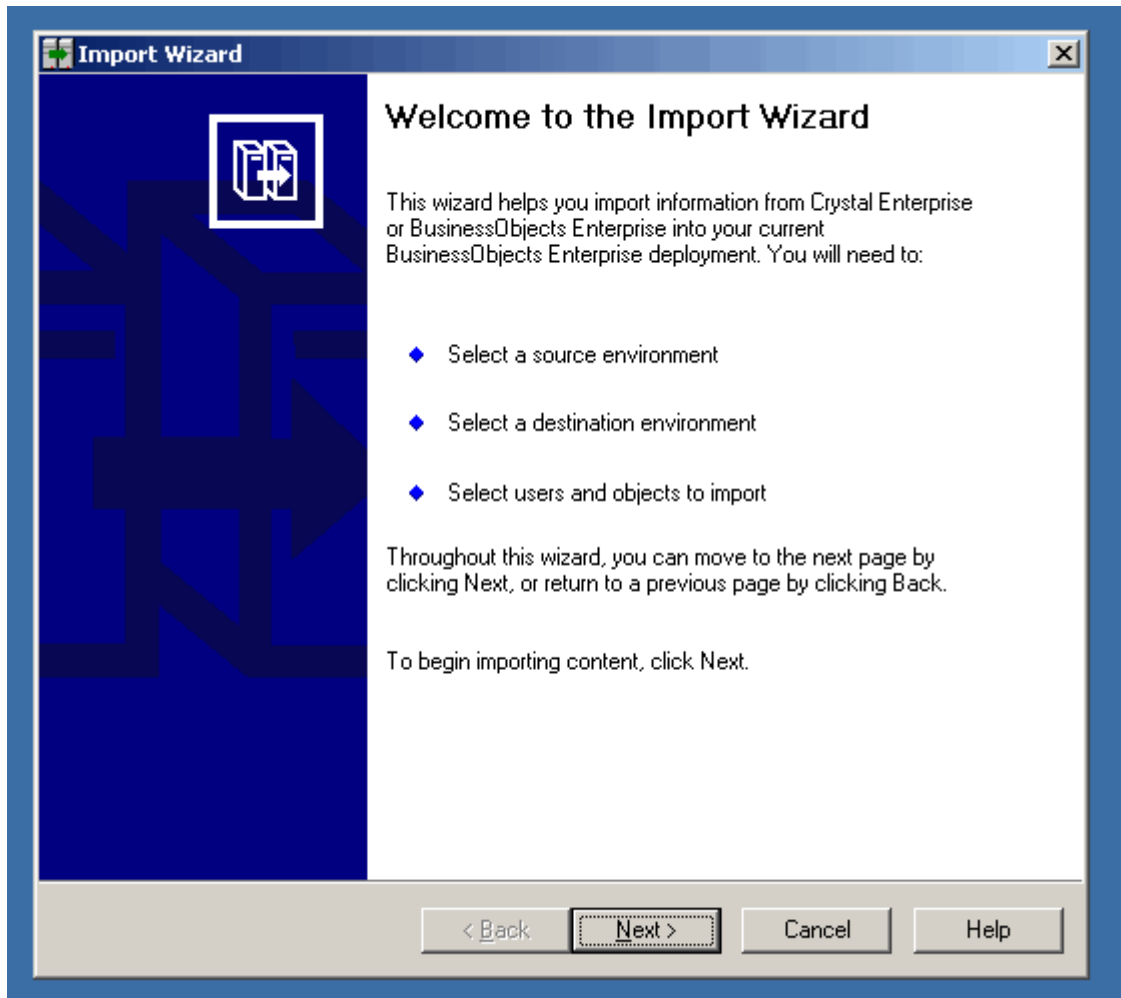
If the combination of all objects becomes too large to handle in a single migration, the migration could be performed incrementally. Since it is desired to maintain security, the users and groups should be migrated first. In fact, if you view the "Select objects to import" panel near the beginning of the Import Wizard, the objects are listed in order of importance. If you are performing incremental migrations, follow this order to successfully migrate your objects and maintain security.

Since the migration process is performing a large number of read/writes, it is best to "quiet" your deployments by stopping all unnecessary processes. This will prevent any errors potentially caused by scheduled or operator interaction performing file locks on any objects.

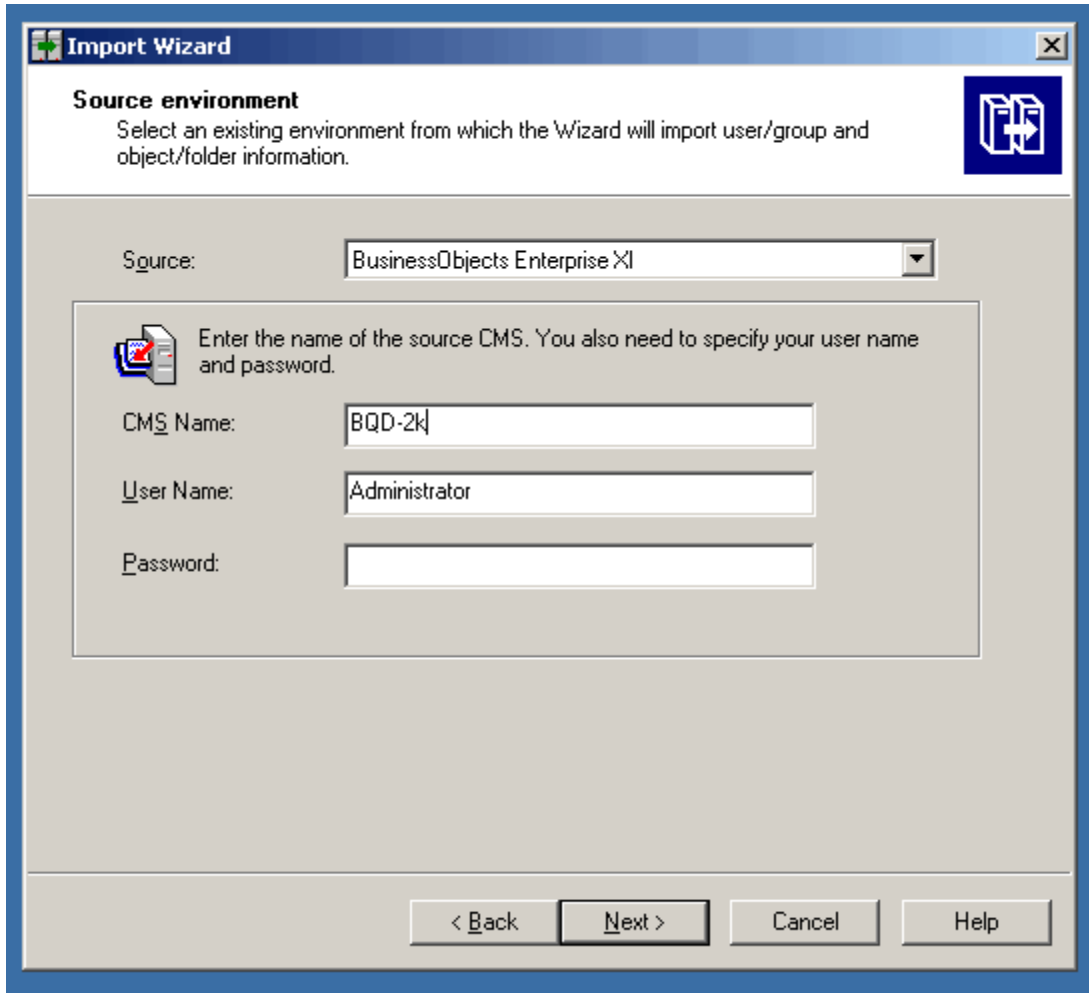
Migration step-by-step

Below are the steps you will need to follow in order to migrate your Business Views.

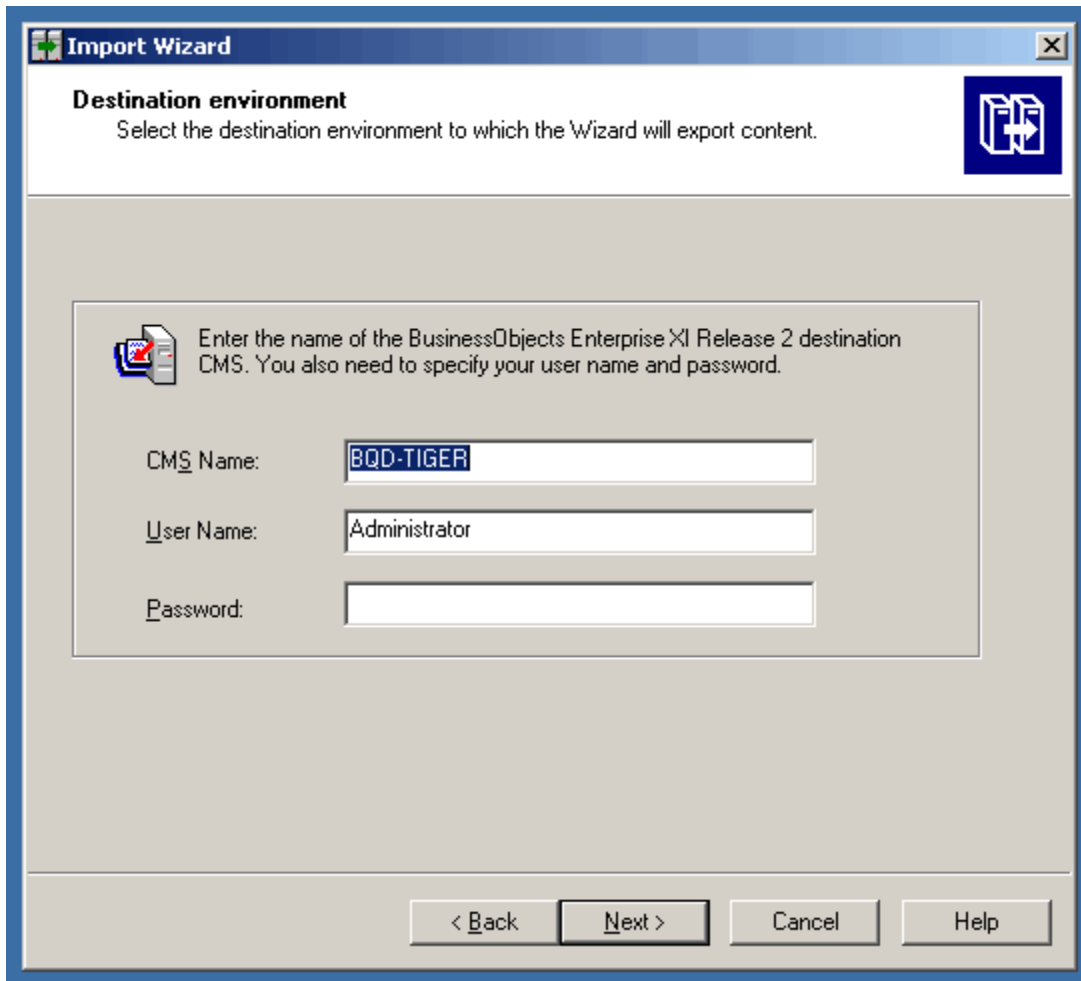
1. Launch the Import Wizard:



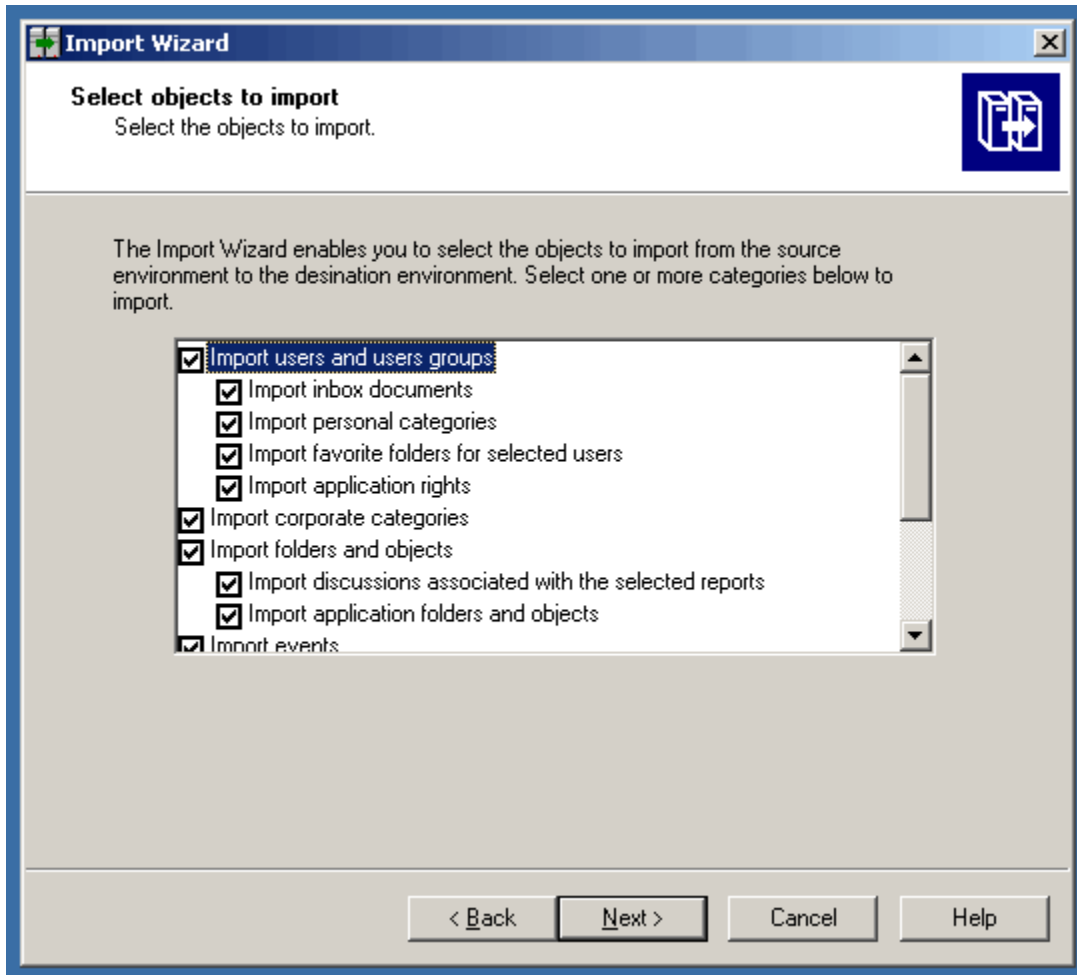
2. Click Next.



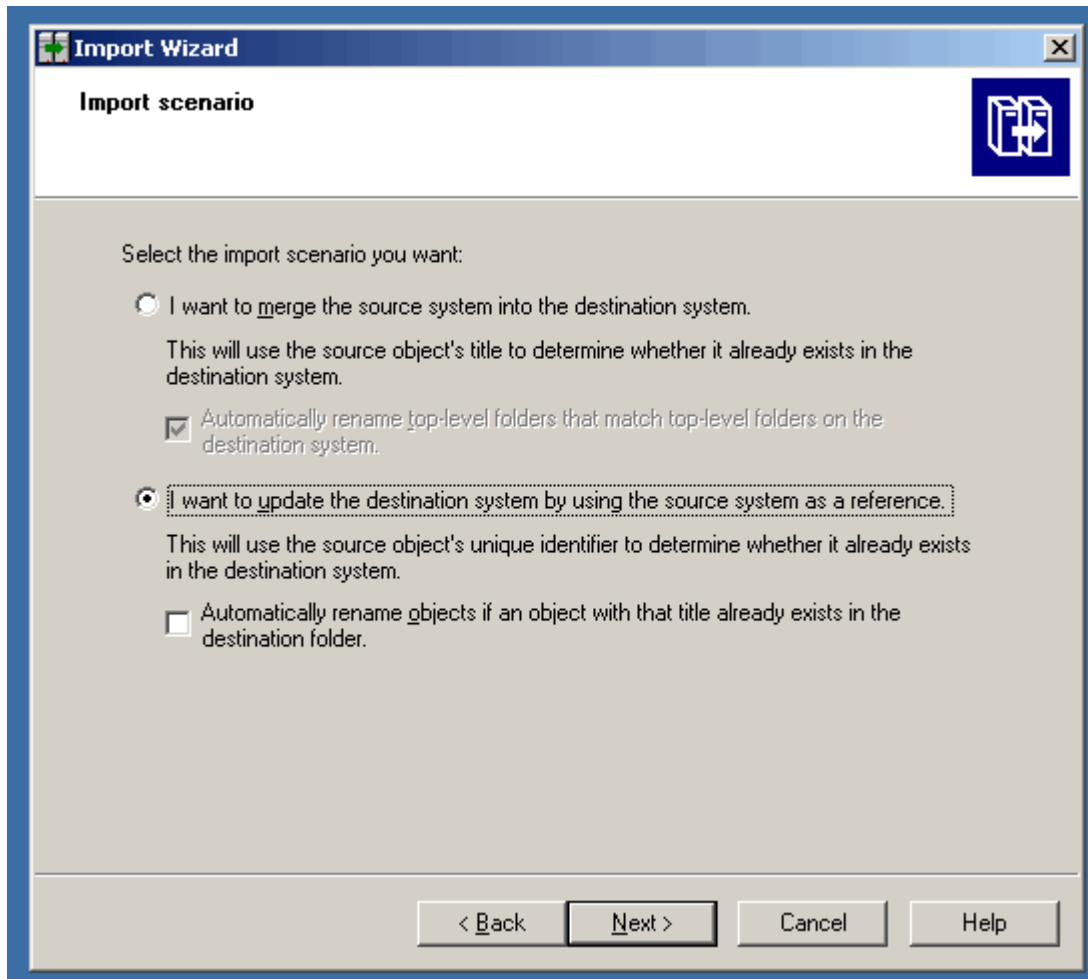
3. Enter the BusinessObjects XI Source Central Management Server (CMS), using the Administrator account. Although this can be accomplished by an account that is a member of the Administrators group, it is best to use the Administrator account, as it is the only account guaranteed to have all the necessary privileges on all objects to migrate security. Click **Next**.



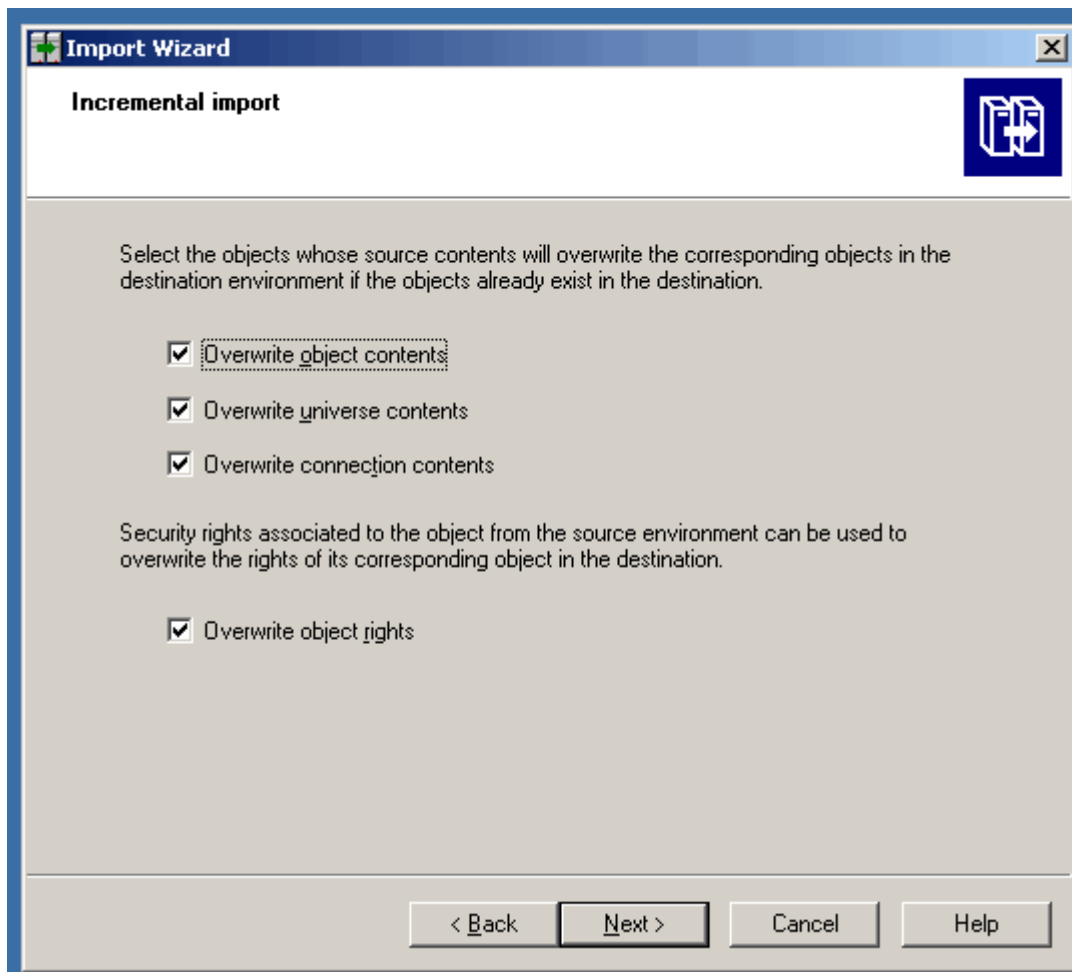
4. Enter your destination CMS, again using the Administrator account. Click **Next**.



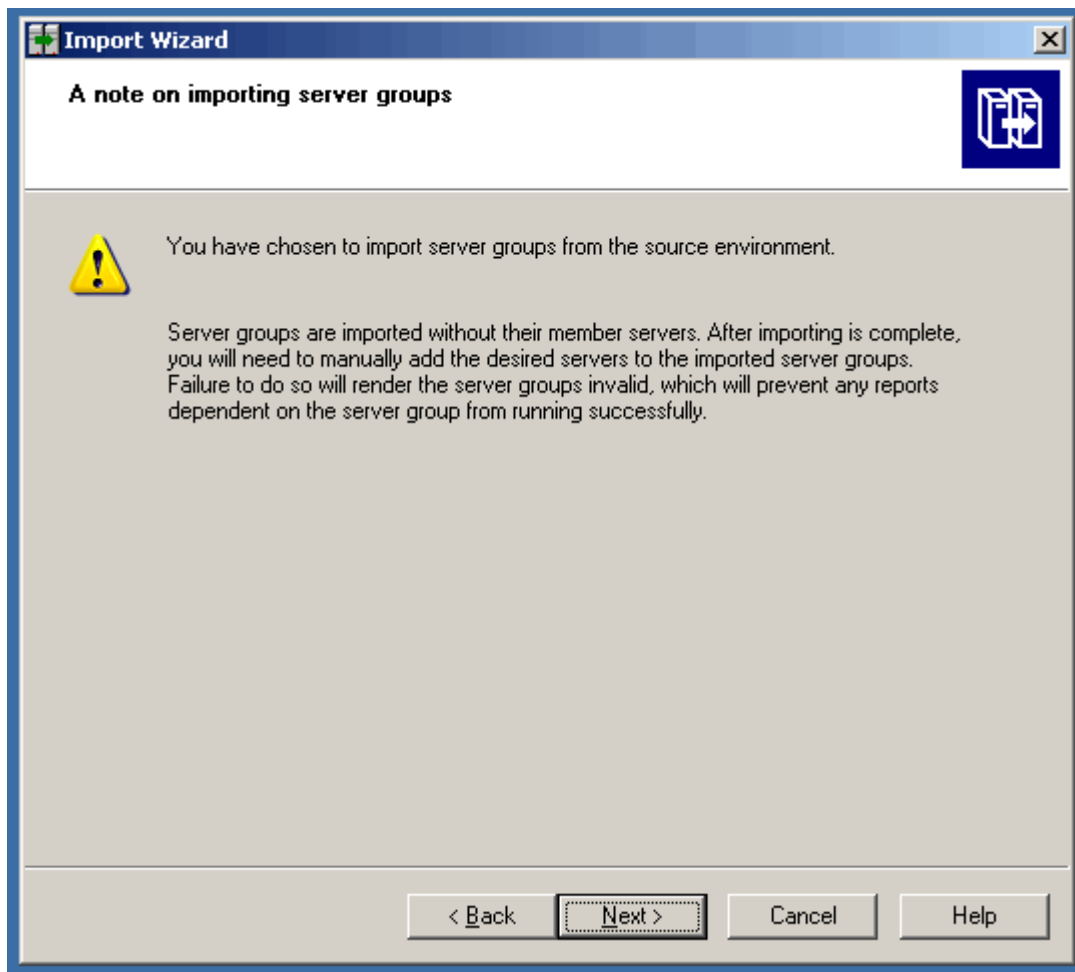
5. In order to migrate Business Views and the reports based on them, while maintaining security, you will have to select the following items at a minimum (selections not shown in image): **Import users and users groups** (their sub-items are typically all selected, but don't need to be for this specific example), **Import folders and objects**, **Import repository objects**. Click **Next**.



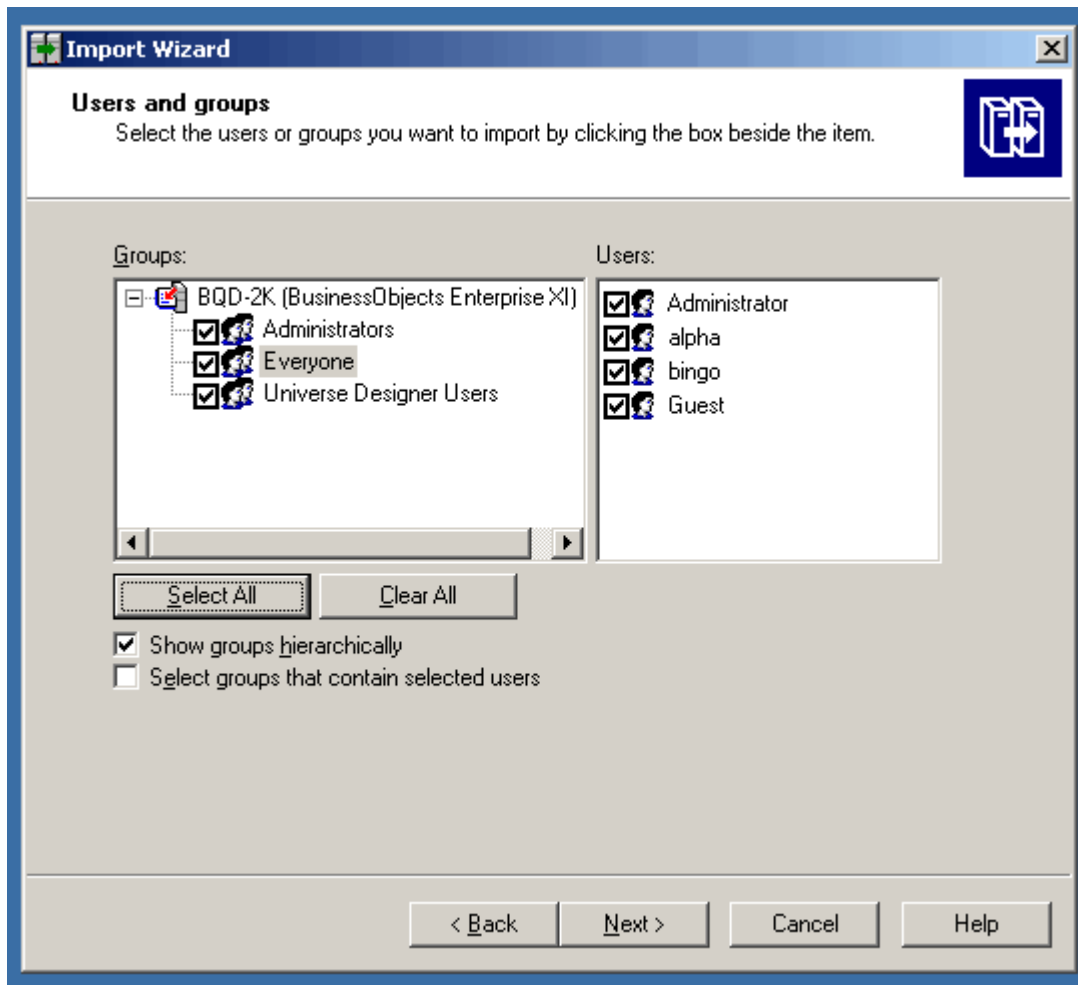
6. Click **Update** but do not rename any objects. This is particularly important if you are performing incremental migrations. You do not want your objects that are already on the destination to be duplicated, but rather overwritten. You do not need to select the “rename” objects option, as this is a first-move scenario. In incremental migrations, you should not be migrating the same objects multiple times, so this also would not require a rename. Renaming may be an option when promoting objects from BusinessObjects XI Release 2 development to BusinessObjects XI Release 2 production if you wish to have multiple copies of objects on your production for version management. However, version management is probably best maintained on a development system. Click **Next**.



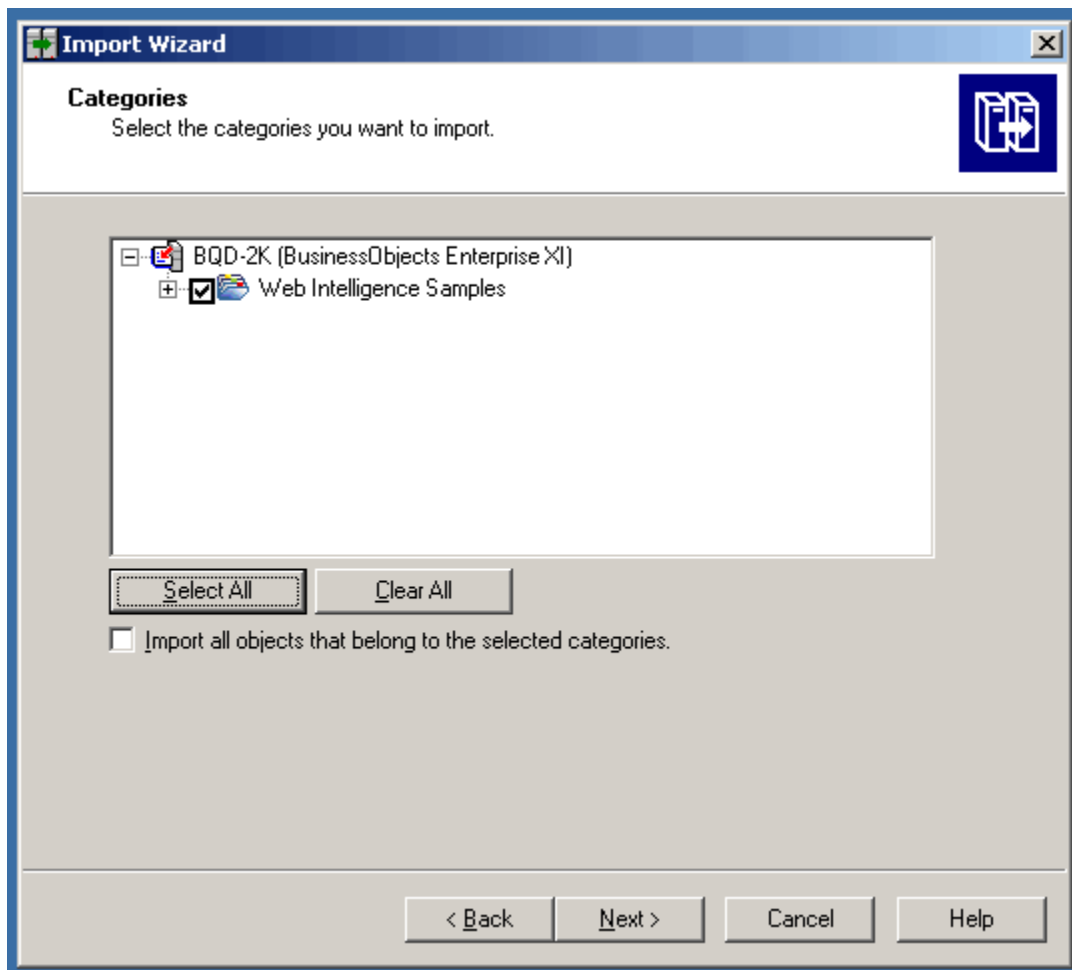
7. For this specific scenario, you will see options to overwrite object contents and object rights. These should both be selected. If you are also migrating universes and connections, there will be options for those as well. Click **Next**.



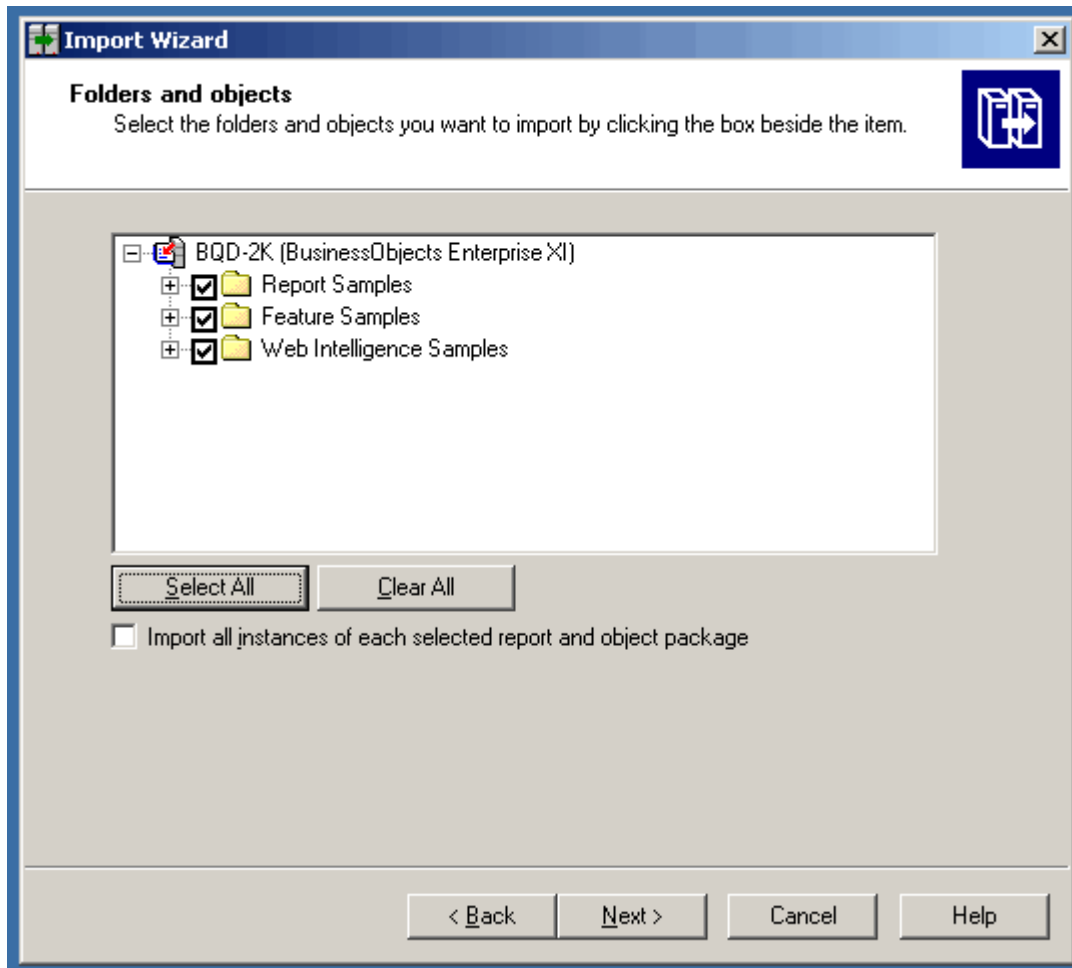
8. If you selected Server Groups in the object to import, you will see this information panel. Click **Next**.



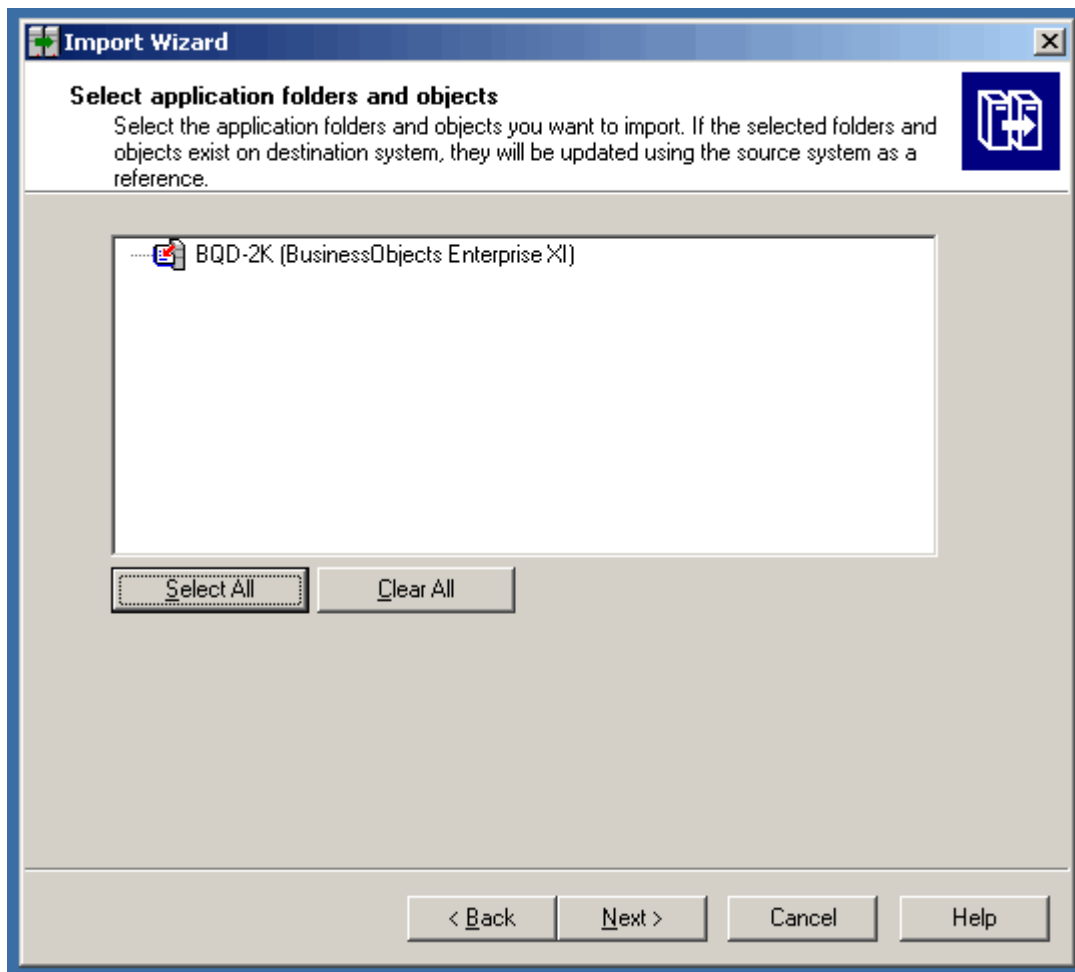
9. If this is the first stage of an incremental or complete migration, select all users and groups. If this is a subsequent incremental migration, and the users and groups have been previously migrated, you do not need to select and migrate them again. You will receive a warning that you are migrating objects with security that may not be maintained, but if your users and groups already exist on your destination, you may ignore it. Click **Next**.



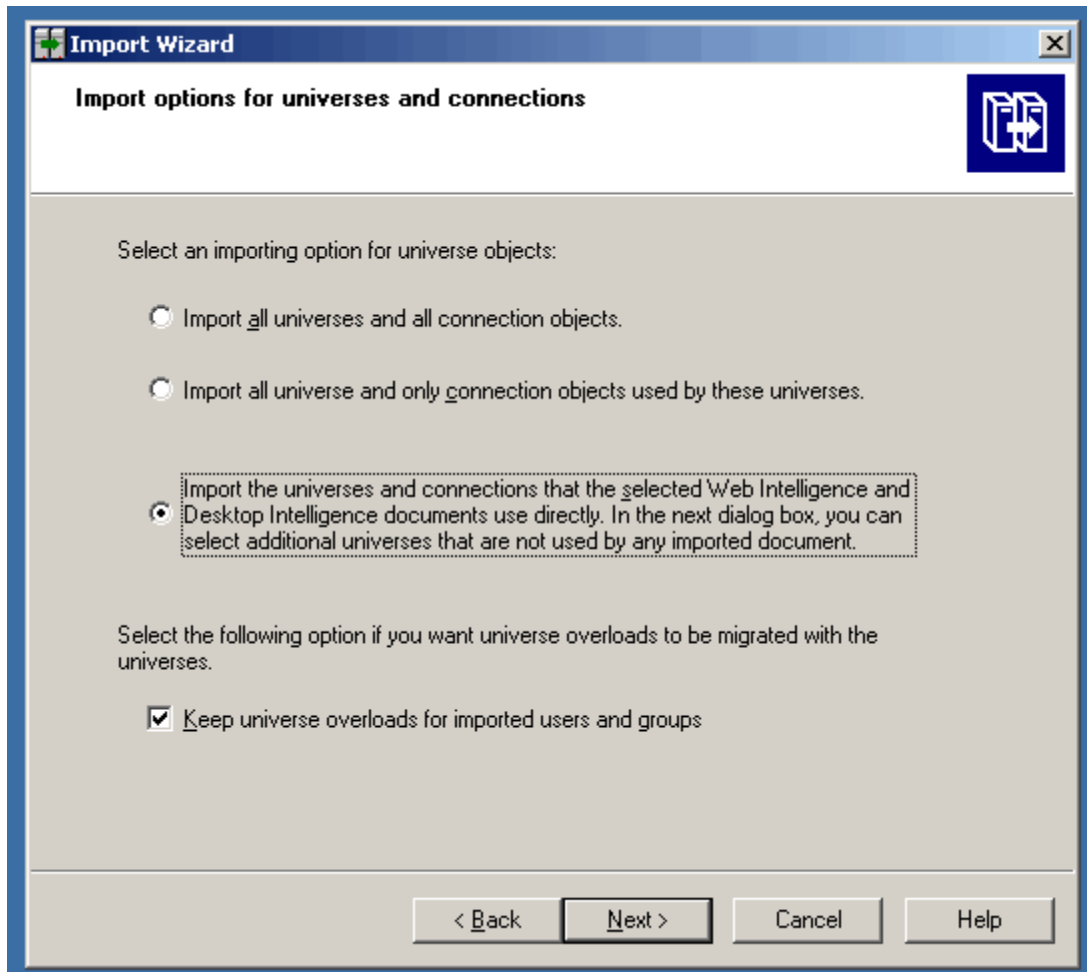
10. If you have selected **Categories** in the list of objects to import, you will be able to select specific ones in this panel. Click **Next**.



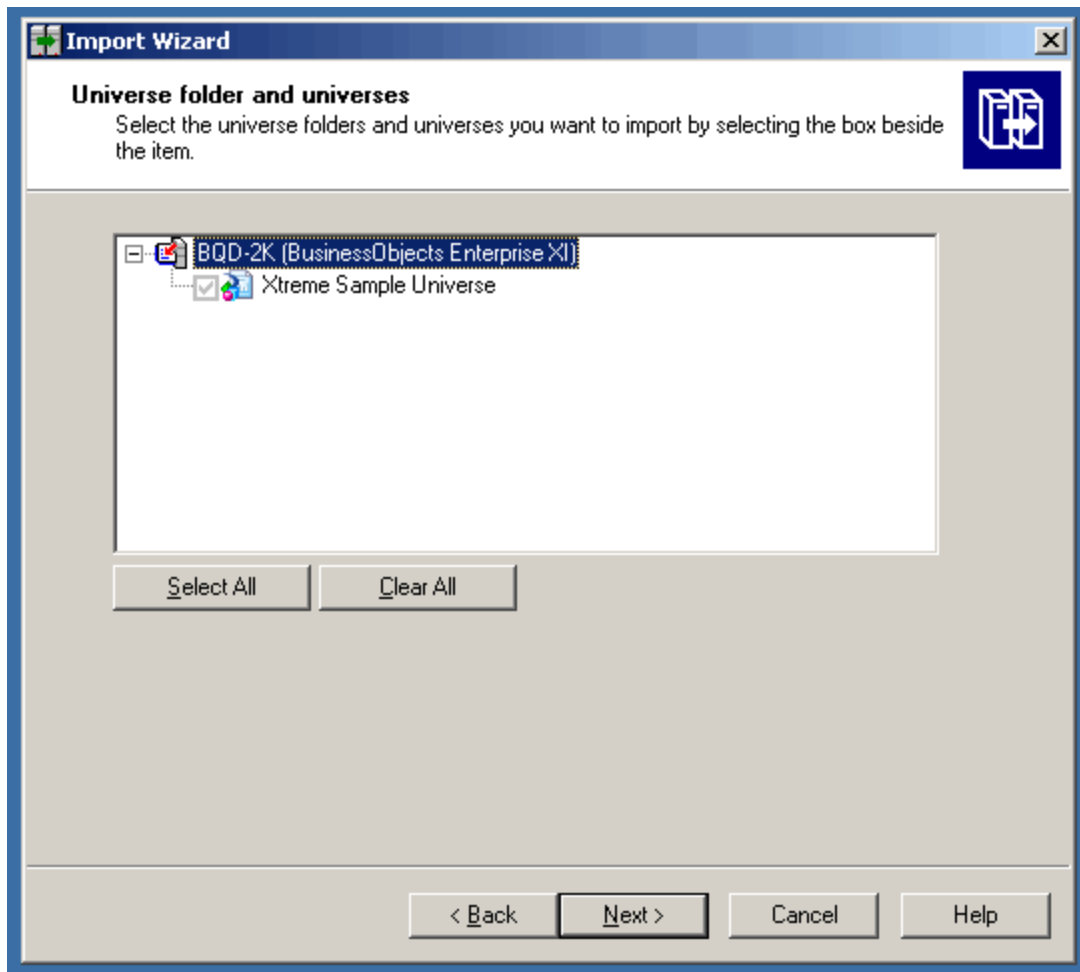
11. Select the folder and objects that contain your Crystal reports based on the Business Views. Note the checkbox at the bottom of the panel – **Import all instances of each selected report and object package** – you must select this in order to migrate your historical and recurring (scheduled) instances. Click **Next**.



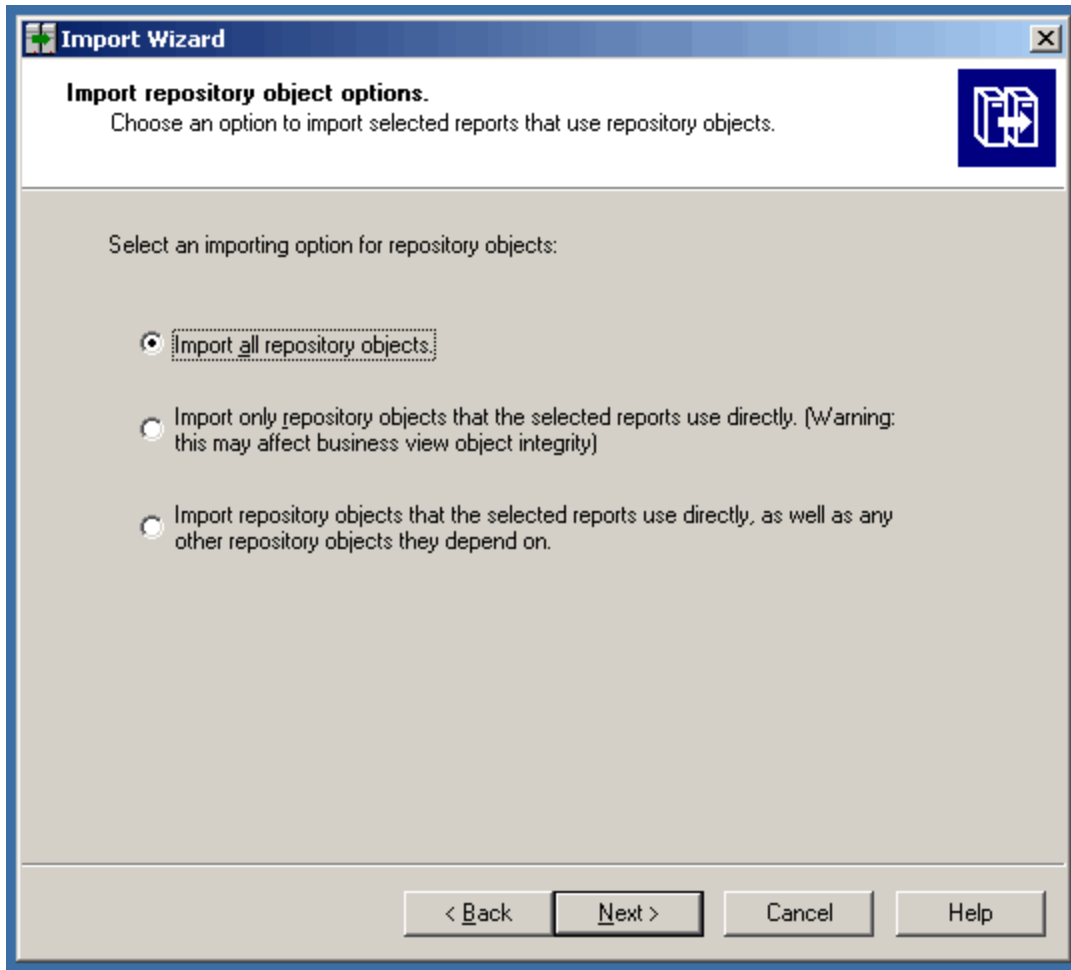
12. If you selected application folders and objects, you can specify which ones in this panel. These are not necessary for this import scenario. Click **Next**.



13. If you selected universes, you will have the option to import all universes and all connection objects, all universes and only the connection objects those specific universes use, or only those universes and connection objects that are used by the specific reports you have selected to migrate. This provides the opportunity to clean up unused universes and connection objects from your deployment. None of these options affects the Business Views scenario. Click **Next**.



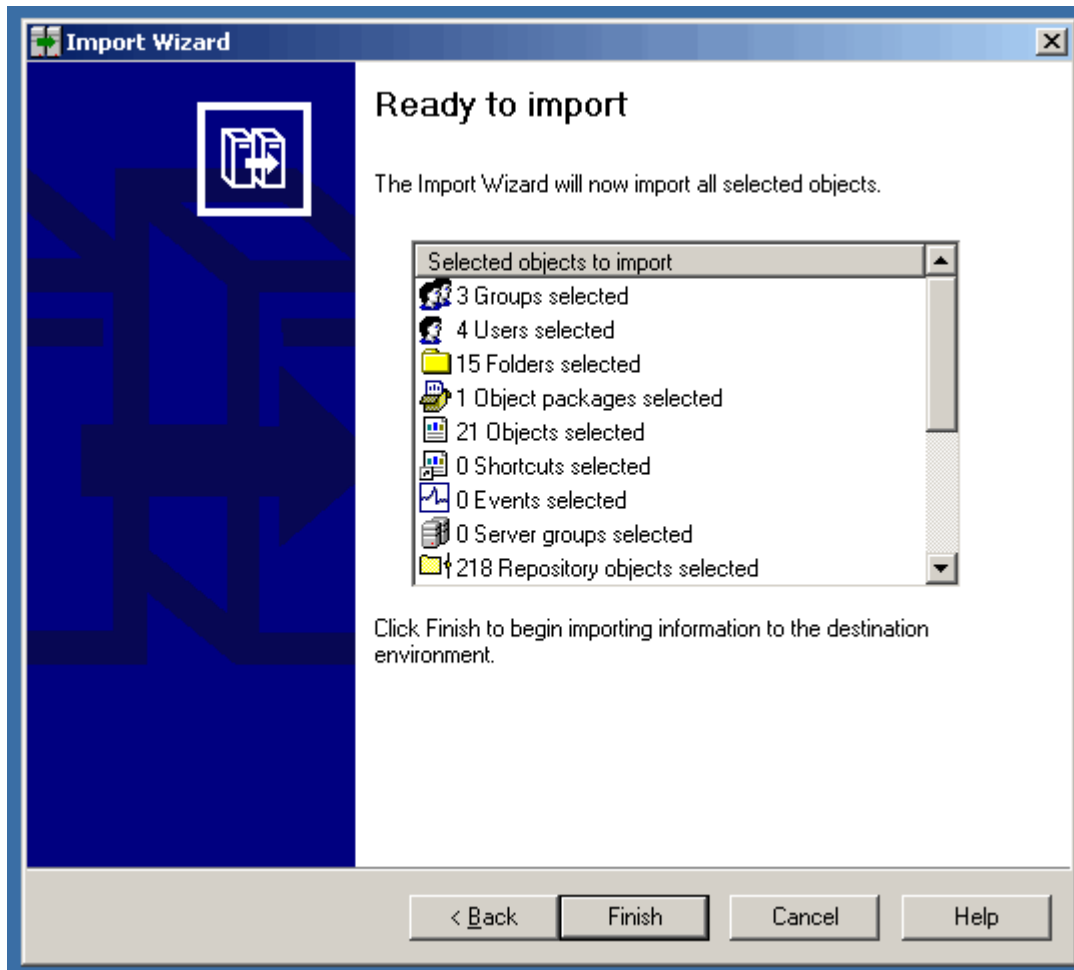
14. If you selected to migrated Universes, you can select specific Universes folders and universes (not necessary for Business Views). Click **Next**.



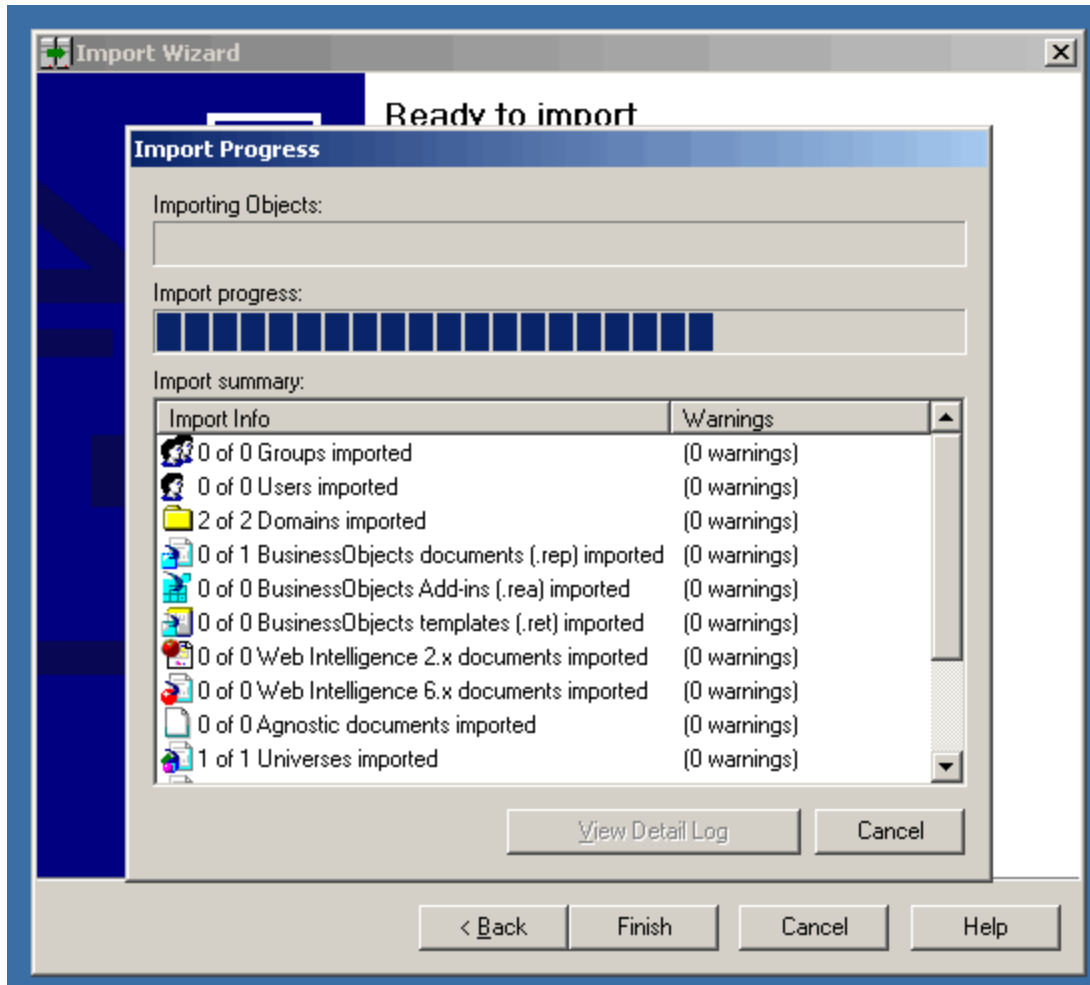
15. This panel is particularly important when migrating Business Views. The first selection will import all source environment Business Views and all their repository objects.

The second selection is an advanced users' option; the warning about object integrity is due to the possibility that some Business View objects may not be migrated if the selected reports do not use them directly. If the Business View contains other objects that the selected reports do not use, those objects will not be migrated. For this reason, it is generally not an option most users would want to select.

The third option will move any Business Views (and all the objects they depend upon) that the selected reports use. This is similar to your universe options in that you could use this to clean up any unused Business Views on the source deployment when migrating. However, if there are Business Views that are not currently used by reports, but that you wish to continue to develop and use later, you will need to select the first option in order to migrate them. Click **Next**.



16. At this point you have selected all your objects and properties. This displays your list of selected objects. Click **Finish** to begin importing.



17. The Import Progress panel will appear during the migration. Once complete, you can view the Detail Log to see if there are any warnings on the import of any objects. You should not see any warnings for an initial move of objects from BusinessObjects XI to BusinessObjects XI Release 2. Click **Done** to exit the Import Wizard.

Finding more information

We recommend that you refer to the product documentation and that you visit our Technical Customer Assurance web site for more resources where required.

Business Objects Technical Customer Assurance Web Site

<http://technicalsupport.businessobjects.com>

Documentation:

<http://support.businessobjects.com/documentation>

Product Updates:

<http://support.businessobjects.com/downloads>

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