

# Crystal Enterprise 8.5

## Upgrading from CE 8.0 to CE 8.5 - Microsoft Windows

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### Overview

This document is intended to assist you upgrade from a Crystal Enterprise (CE) 8.0 system to a CE 8.5 system.

<b>NOTE:</b>	The scenario outlined in this document is a basic upgrade in a <b>non-production environment</b> . All CE components are installed on a single server and the system database is Microsoft SQL Server. Most default settings are kept in this scenario.  For assistance upgrading a production environment, please contact your CE account manager or call 1-800-877-2340 for information on consulting services.
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### Contents

<b>INTRODUCTION</b> .....	<b>2</b>
<b>BEFORE THE UPGRADE</b> .....	<b>2</b>
<i>Release Notes</i> .....	2
<i>Back up your Data</i> .....	2
Automated Process Scheduler (APS) Database .....	3
Back up the File Repository Server (FRS) Content .....	3
<i>Migrate from a Staging Server</i> .....	3
<b>THINGS TO CONSIDER</b> .....	<b>4</b>
<i>General</i> .....	4
<i>Directory Structure</i> .....	4
<i>CSP Backup</i> .....	4
<i>Event Server</i> .....	5
<i>APS Database</i> .....	5
<b>THE UPGRADE</b> .....	<b>5</b>
<i>Overview</i> .....	5
<i>Begin Install and Specify Install Directory</i> .....	5
<i>Specify new APS database type and location</i> .....	6
Option A: Provide DSN to a Supported Database .....	7
Option B: Use MSDE / SQL Server on the same computer as the APS .....	10
<i>Copy new CE 8.5 files to the install directory</i> .....	11
<i>Copy data to the new APS database</i> .....	11
<b>TROUBLESHOOTING</b> .....	<b>14</b>
<i>WCS fails intermittently following upgrade from CE 8 to CE 8.5</i> .....	14

<b>MORE INFORMATION TO COME .....</b>	<b>15</b>
<b>CONTACTING CRYSTAL DECISIONS FOR CONSULTING SERVICES.....</b>	<b>15</b>
<b>CONTACTING CRYSTAL DECISIONS FOR TECHNICAL SUPPORT .....</b>	<b>15</b>

## Introduction

This document contains information on the following topics:

- What to be aware of prior to upgrading such as backing up data, release notes, and future additions to this paper
- Things to consider when upgrading
- Steps to perform an upgrade

This document is a work in progress. More information will be added shortly regarding topics such as migrating from a CE 8.0 system to an existing CE 8.5 system. Check this paper regularly for updates.

## Before the Upgrade

There are several things you should consider before beginning an upgrade from CE 8 to CE 8.5.

### Release Notes

<b>CRITICAL</b>	It is critical that you read and understand the Release Notes for CE 8.5 prior to upgrading. A number of crucial restrictions, changes, and updates are listed there. Knowing this information is critical to a successful upgrade.
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The Release Notes are located on the root of the CE 8.5 installation disk or you can find them at <http://support.crystaldecisions.com/docs> by searching for the file name ce85\_release\_notes.pdf

Be sure to look at the following:

- Windows Considerations – page 4
- Important Patches – page 8
- Notes and Limitations – page 10

### Back up your Data

While backing up data is not necessary for the upgrade to take place, it is critical to protect your production system should any complications occur during the install.

Be sure to back up the Automated Process Schedulers (APS) database and the File Repository Server (FRS) content.

## Automated Process Scheduler (APS) Database

To determine where the APS database is, complete the following steps:

1. Open the Crystal Configuration Manager (CCM) and click the APS from the list of servers.
2. Click the **Stop** icon to stop the APS, right click the APS and from the submenu click **Properties**.
3. Click the Configuration tab on the Crystal APS Properties box. Notice the value of the APS Data Source box. This box displays the name of your APS ODBC Data Source Name (DSN). Make note of this name.
4. Go to **Start > Settings > Control Panel** and click **Administrative Tools**.
5. Double click **Data Sources (ODBC)** to open the **ODBC Data Source Administrator** and then click the **System DSN** tab.
6. Find the DSN noted from the APS **Configuration** box and click the **Configure** button.
7. This takes you to the DSN configuration for the APS database. Click **Next** through the DSN configuration to find out what server the APS database is on and what database is being used.

For detailed instructions on backing up your current database, see your database administrator.

## Back up the File Repository Server (FRS) Content

To ensure there is no loss of objects or instances during the upgrade process, it is recommended that you back up all FRS content.

The input FRS content (objects) is located at <drive>:\Seagate Software\Enterprise\FileStore\Input and the output FRS content (instances) is located at <drive>:\Seagate Software\Enterprise\FileStore\Output.

Save the **Input** and **Output** folders and all their contents to a safe location before performing the upgrade.

## Migrate from a Staging Server

If resources exist in your environment, the preferred option for upgrading is to migrate the database and objects from an existing CE 8 environment to a new install of CE 8.5 rather than doing an upgrade install of CE 8.5 over an existing install of CE 8.

In this case, a new install of CE 8.5 is done on a machine that does not have CE on it. Then the database and objects from CE 8 are migrated into the new CE 8.5 system.

This process will be discussed as this document is updated.

## Things to Consider

### General

- Do all installations while logged on to the computer as the local administrator. While it is tempting to log on as a domain user that is a member of the local administrators group, these users can have reduced rights. For best results, it is recommended that you do all installations as the local administrator.
- Ensure that you install all components on supported platforms. For information on supported platforms, search for the following knowledge base article on our support site at <http://support.crystaldecisions.com/kbase:c2011138>.

<b>IMPORTANT:</b>	<p>Even if you choose to install all CE files to a drive other than the system drive, some files are still installed on this drive. This is unavoidable in a Microsoft Windows environment.</p> <p>Because of this, ensure that you have at least 700 Megabytes (MB) of unused space in the system drive.</p>
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- You do not need to uninstall a previous version of Crystal Enterprise before upgrading. If you do choose to uninstall first, you will lose all the users and objects that you have in Crystal Enterprise 8.0.

### Directory Structure

When you upgrade from CE 8 to CE 8.5, the CE 8.5 system retains the CE 8.0 directory structure for all objects and instances. CE 8.5 program files are stored in <drive>:\Program Files\Crystal Decisions\Enterprise and the input and output directories remain at <drive>:\Seagate Software\Enterprise\FileStore.

You can change the root directory to the new file structure by changing the properties of the Input and Output File Repository Servers in the CMC.

Do not move or remove any folders or files. All CE 8 objects are still stored in the CE 8 folder structure and shared files may still reside in the Seagate Software directory.

### CSP Backup

If an environment has some customized CE standard web pages (csp pages), it is recommended that you back these up as CE 8.5 replaces them with its standard versions.

For example:

If you have a customized ePortfolio, backup the csp code so it can be applied to the CE 8.5 ePortfolio. Because ePortfolio is very different between CE 8 and CE 8.5, the csp used to customize the CE 8 ePortfolio cannot be used directly to customize the CE 8.5 ePortfolio. The code can be used as a guide to customize the new ePortfolio.

## Event Server

This server is new in CE 8.5. The standard upgrade of CE 8.5 does not install this server. To install this server while upgrading, select **Custom Install** and select **Event Server** from the components list.

## APS Database

Unlike CE 8, CE 8.5 does not support Microsoft Access (Access) as the APS database. The new default APS database is the Microsoft Data Engine (MSDE), or SQL Server if that is already installed.

Because the CE 8.5 APS database structure is different from the CE 8 APS database structure, it is not possible to use the CE 8 APS database with CE 8.5. The existing APS database must be migrated over to the new structure. The steps to migrate the APS database are discussed in **The Upgrade** section of this paper.

<b>NOTE:</b>	If you are using the MSDE as your APS database, do not shut down the MSDE service prior to the upgrade. The service must be running in order to be accessed.
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You cannot create a new blank APS database during the upgrade process. This is done after the upgrade is complete. For more information regarding this step, refer to page 213 of the Crystal Enterprise 8.5 Administrator's Guide.

## The Upgrade

### Overview

This section outlines the four basic stages of upgrading from CE 8.0 to CE 8.5:

1. Specify which directory you want to install CE to.
2. Specify where your new APS database is located.
3. Copy new CE 8.5 files to the specified location.
4. Copy data from the old APS database to the new APS database.

### Begin Install and Specify Install Directory

Before the upgrade begins, CE 8.5 looks for an existing installation of CE 8 and prompts you to do a new install or an upgrade install.



**Figure 1**

The Product Keycode (keycode) is necessary to indicate which type of install you have purchased. Your keycode is located either on the CD sleeve of the installation disc or on your license agreement. If you cannot find your keycode, please contact your sales representative.

Once the keycode is entered and the **Next** button is clicked, the four steps listed above begin.

Figure 2 illustrates the next install screen that appears. The first task is to select the installation directory.

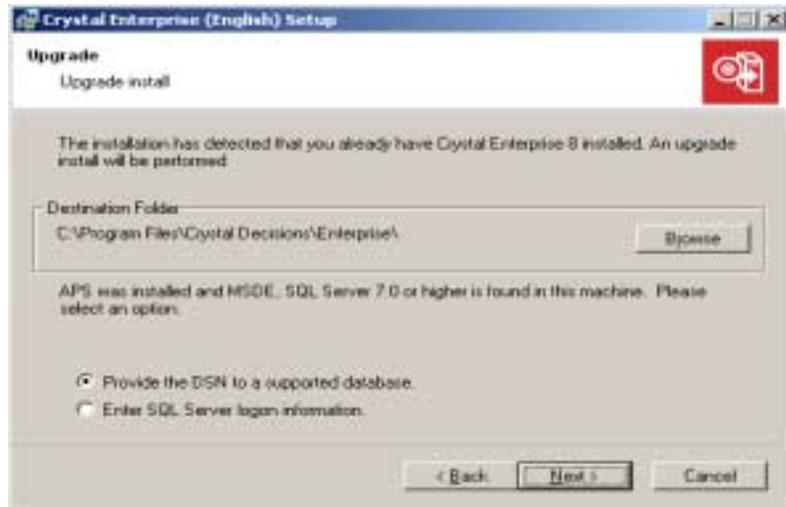
## Specify new APS database type and location

Once the install directory is selected, you must select what kind of APS database you want to use with CE 8.5. Because the database structure of the CE 8.5 database is different than the CE 8.0 APS database, the install automatically asks for database information.

You have two choices when specifying the new APS database:

- Provide the DSN to a supported database (Option A)
- Enter SQL Server logon information (Option B)

The option you select depends on what kind of database you want to use with CE 8.5.



**Figure 2**

If you want to use a supported database on a database server that is different from the APS computer, select **Option A**. If you have the default MSDE database or Microsoft SQL Server installed on the computer that you are installing the APS on and you want to use it as the APS database, choose **Option B**.

In Figure 2, notice that MSDE or SQL Server 7 or higher was found on this computer. If neither MSDE nor SQL Server is found on the computer, you will not have the option to enter SQL Server logon information.

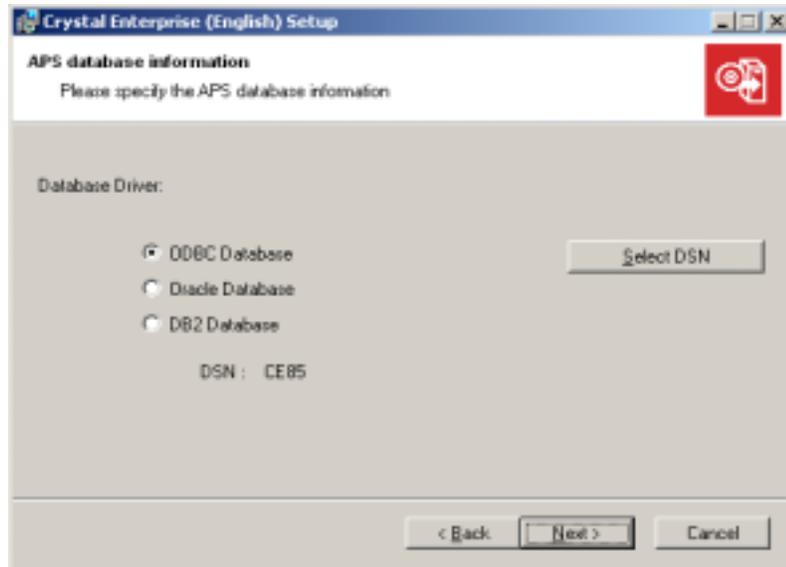
Both options A and B outline the second major step in the upgrade process, which is specifying the location of the new APS database.

### Option A: Provide DSN to a Supported Database

If you select this option, you have two connection choices – ODBC and Native. If you choose ODBC, you must select or create a system DSN which points to a new database – the database must already exist. You can select or create a new DSN by clicking the **Select DSN** button shown in Figure 3.

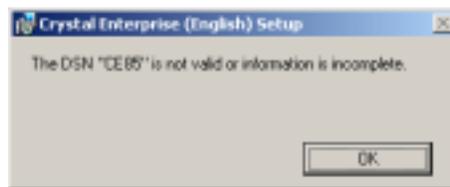
If you choose a native connection to Oracle or DB2, the account that you are logged on with must have the necessary permissions on the database to write to it (Create, Write, Delete). In this case, you must use a domain account that is a member of the local administrator's group.

A list of supported APS databases can be found at <http://support.crystaldecisions.com/kbase> by searching for article c2009003.



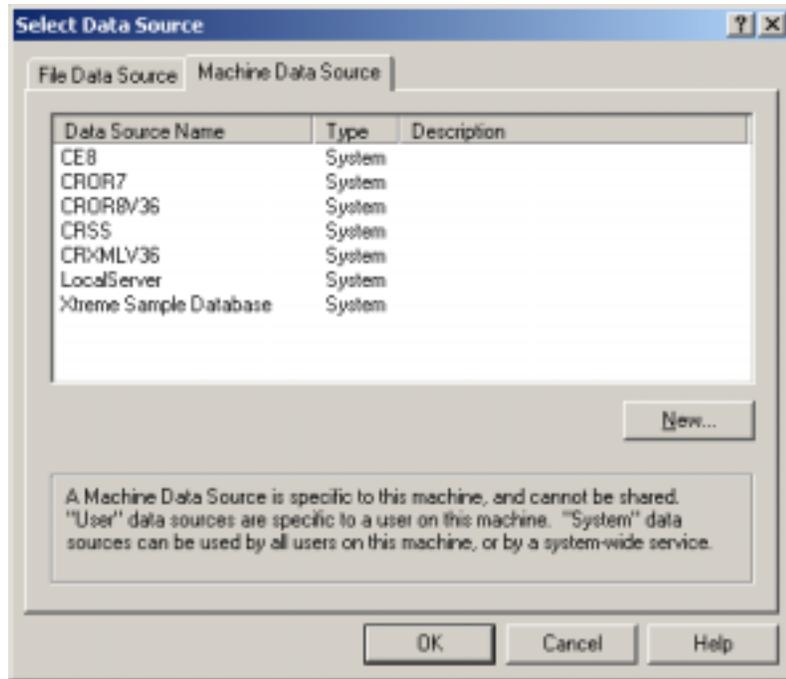
**Figure 3**

If you do not click the **Select DSN** button and click the **Next** button, the message displayed in Figure 4 appears. This message occurs because the system **DSN CE85** does not exist. Notice that the DSN in Figure 3 is named CE85 by default.



**Figure 4**

To connect successfully to a supported database via ODBC, you must create a new DSN or select an existing DSN. To do this, click the **Select DSN** button. This brings up the **Select Data Source** box where you can select an existing DSN or create a new DSN (Figure 5). Click the **Machine Data Source** tab for a list of existing DSNs.



**Figure 5**

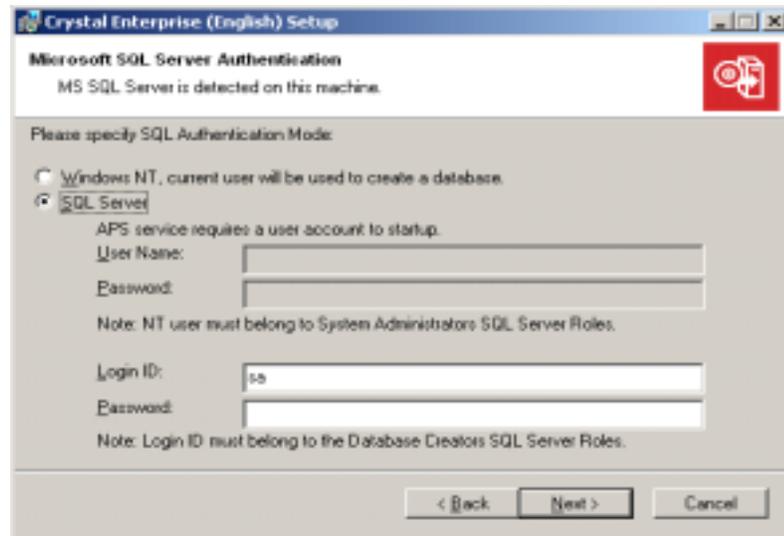
**NOTE:** Do not select the CE8 DSN from the list of existing DSNs. Selecting this DSN will work as a connection to the CE 8.5 database but the DSN will not be renamed to CE 8.5. Because the DSN will still be called CE8, it can lead to confusion.

You can select an existing DSN or click the **New** button to create a new DSN. If you create a new DSN, you can name it anything you like.

After the creation of the DSN, the install starts to copy the new CE 8.5 files into the install directory you specified.

## Option B: Use MSDE / SQL Server on the same computer as the APS

If you make this selection, the following box appears.



**Figure 6**

Depending on which authentication type you select from the box in Figure 6, you must consider different things.

If you select the **Windows NT** option, ensure that you enter a domain user name and password that have at least CREATE rights to the database. Also, because this account is the account that the APS service will run under, it should be a member of the local administrators group.

If you select the **SQL Server** option, enter the logon ID and password as shown in Figure 6. The default logon for the MSDE database is the user name "sa" with no password.

With both the **Windows NT** and the **SQL Server** option the install creates a new system DSN to the database.

## Copy new CE 8.5 files to the install directory

After the creation of the DSN, the install starts to copy the new CE 8.5 files into the install directory you specified. When the files are successfully copied, the screen in Figure 7 appears.



Figure 7

## Copy data to the new APS database

Up to this point you have created a new DSN for the CE 8.5 APS database, specified the authentication type and location of the system database, and installed new CE 8.5 files. However, no data from the CE 8.0 system has been copied to this new database. That is the next step.

The following steps outline how to copy data from your existing CE 8.0 APS database to your new CE 8.5 APS database.

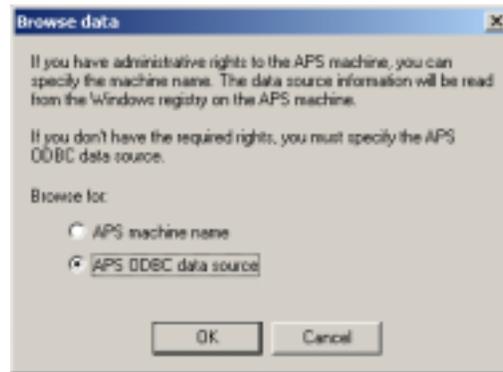
When you click **Finish** on the screen shown in Figure 7, the screen shown in Figure 8 appears.



Figure 8

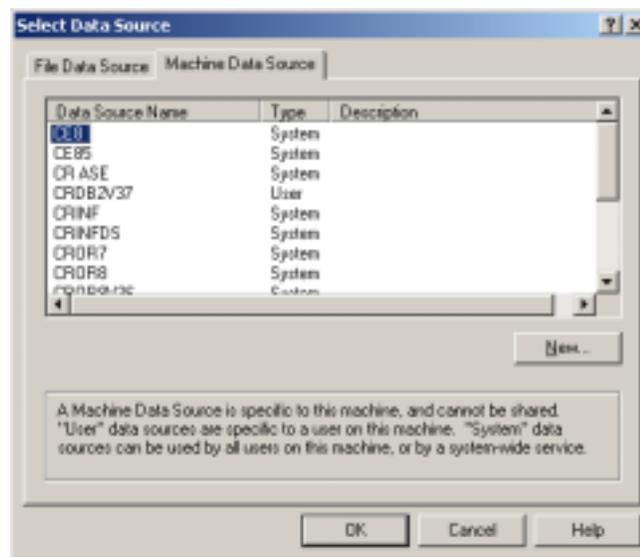
Note that Figure 8 shows **Crystal Enterprise 8** selected. The default is **Crystal Enterprise 8.5** so ensure that you change it to **Crystal Enterprise 8** before clicking the **Specify** button. When you click the **Specify** button, the screen in Figure 9 appears.

Figure 9 illustrates pointing to an APS ODBC data source as the source of the APS database.



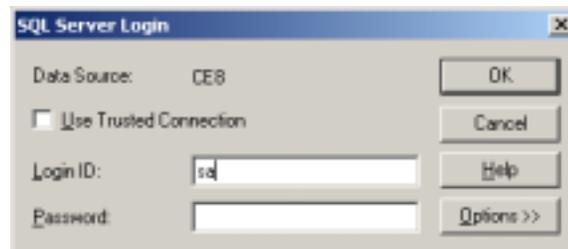
**Figure 9**

Click **OK** and then click the **CE8 DSN** on the **Machine Data Source** tab of the **Select Data Source** box. See Figure 10



**Figure 10**

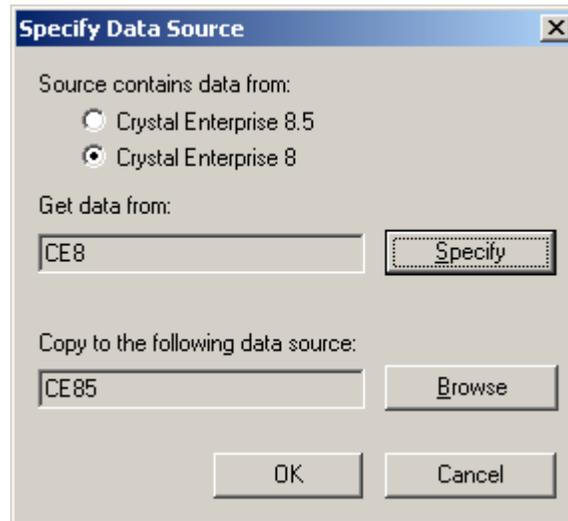
Click **OK** to log on to the database. Figure 11 shows the Logon window for a SQL Server database.



**Figure 11**

Once you have entered the correct logon information, click **OK**.

The next screen displays the source database you have selected and the CE 8.5 destination DSN. Click **OK** to start the data migration. You may see a warning that all existing CE 8.5 tables will be overwritten. That is okay because the target database should be blank.



**Figure 12**

Depending on the size of the existing database and the network speed, the migration can take quite a bit of time. Transfer times in excess of 60 minutes have been observed.

When the data has been successfully copied, a screen will appear that says **APS database setup completed**. Click **OK** on this screen and then open the CCM. Start the APS service and then enable all the servers. You must enable the servers before you can log on.

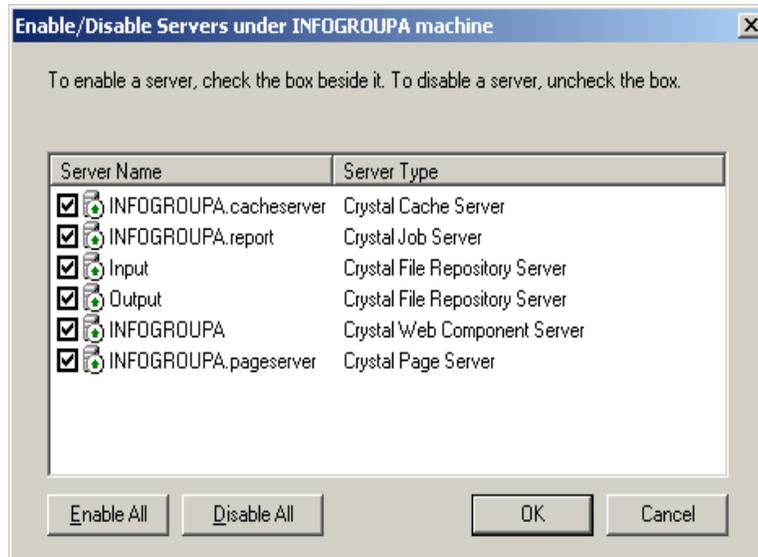
To enable the servers, click the **Enable/Disable Servers** icon as shown in Figure 13.



**Figure 13**

This opens the box shown in Figure 14.

Click the **Enable All** button and then click **OK**.



**Figure 14**

The system is now upgraded to CE 8.5.

## Troubleshooting

### WCS fails intermittently following upgrade from CE 8 to CE 8.5

After upgrading from Crystal Enterprise (CE) 8 to CE 8.5, the web component server (WCS) fails at random intervals. The following message appears in the application log:

"Maximum amount of time for the script to execute exceeded. You can change this limit by specifying a new value for scripttimeout."

The WCS was not failing before the upgrade. Why is the WCS failing?

The WCS is failing because the upgrade install of CE 8.5 did not create the registry key 'scripttimeout'. During a new install of 8.5, this key is added properly.

This key was missing in two locations:

HKEY\_LOCAL\_MACHINE\SOFTWARE\Crystal Decisions\8.5\Web Component Server\Components\csp

- AND -

HKEY\_LOCAL\_MACHINE\SOFTWARE\Crystal Decisions\8.5\Web Component Server\Instances\Machine Name\Components\csp

This is a known issue with CE 8.5. This issue has been assigned Track ID ADAPT000156439.

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**WARNING:**

The following workaround involves editing the registry. Using Registry Editor incorrectly can cause serious problems that may require you to reinstall the Windows operating system. Use Registry Editor at your own risk.

**INFORMATION:**

View the 'Changing Keys And Values' online Help topic in Registry Editor (Regedit.exe).

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To work around this issue, back up the registry and then manually add the 'scripttimeout' key to the two locations noted above.

After the registry key is added, the WCS does not fail.

## More information to come

This document will be expanded shortly to include instructions on migrating an existing CE 8 system to a new CE 8.5 system as well as things to consider when migrating to or from an APS database that is not SQL Server or MSDE.

Please continue checking this paper for future updates by searching for ce8\_to\_ce85\_upgrade.pdf at <http://support.crystaldecisions.com/docs>

## Contacting Crystal Decisions for Consulting Services

For assistance with upgrading a production environment, please contact your account manager or call 1-800-877-2340 for information on consulting services.

## Contacting Crystal Decisions for Technical Support

We recommend that you refer to the product documentation and that you visit our Technical Support web site for more resources.

**Self-serve Support:**

<http://support.crystaldecisions.com/>

**Email Support:**

<http://support.crystaldecisions.com/support/answers.asp>

**Telephone Support:**

<http://www.crystaldecisions.com/contact/support.asp>