

Upgrading to BusinessObjects XI

Moving your deployment from Crystal Enterprise

Overview

This document outlines the overall upgrade process and provides several potential considerations that you should be aware of when planning to upgrade to BusinessObjects Enterprise XI. If you follow these simple steps you should find the process seamless and efficient. We strongly recommend that customers read both the documentation and readme file before beginning any migration. In addition, migration and upgrade [consulting](#) services and [training](#), are available directly from the Business Objects Global Services department.

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Introduction

This document outlines the process of upgrading to BusinessObjects Enterprise XI for current Crystal Enterprise users. The process utilizes a number of utilities to aid in the migration from your current deployment: the import wizard, database migration utility, data source migration utility, and inline upgrade capabilities. These utilities serve to automate migration for administrators, allowing them to focus on other aspects of the business. While most of the upgrade is automated, there are some manual steps described in this document that will further simplify the process.

Import Wizard

The import wizard is a Win32 application that automates much of the migration for administrators. This utility allows administrators to move content from a source system to a destination system. In the case of BusinessObjects Enterprise XI, the supported source systems include Crystal Enterprise 8, 8.5, 9, 10; BusinessObjects Enterprise 6.x and Seagate Info 7.5.

Administrators can select users, groups, folders, categories, Crystal reports, BusinessObjects Web Intelligence documents, universes, and connections. Note that universe and connections are automatically brought over to BusinessObjects XI depending on their associated document.

Database migration

Administrators may also perform a database migration during their upgrade. During this process, contents of the Crystal Enterprise central management server (CMS)/automated process Scheduler (APS) database are directly copied to the new CMS database. This process differs from the import wizard which copies all content, in addition to the content of the file repository server. Database migration does not copy the contents of the file repository server, but only the pointers of those files (which are stored in the physical database).

Database migration is supported for the following Crystal Enterprise systems: 8.5, 9, and 10.

Data Source Migration Wizard

The data source migration wizard is a tool that allows you to migrate reports that are based on Crystal queries, dictionaries, and (Seagate/Crystal) InfoViews to a BusinessObjects Enterprise XI deployment. The wizard converts the data source of each report into an object that is usable in BusinessObjects Enterprise, and then resets the data source location of the report to point to the new object.

For more detail on the data source migration wizard, please refer to the [Administrator's Guide](#).

Inline upgrade

An inline upgrade enables administrators to install directly on top of their existing Crystal Enterprise system. This ability simplifies migration since Crystal Enterprise services will be automatically upgraded to the latest version. During this process, the database migration utility will launch to copy the contents of the CMS/APS repository to the new CMS repository.

Please review chapter 5 Upgrading and Migrating located in the [installation guide](#) for BusinessObjects Enterprise XI. This chapter will provide the exact steps for performing an inline upgrade. Unlike the import wizard, inline upgrades are only possible from the following Crystal Enterprise systems: 8.5, 9, and 10.

Planning the upgrade

There are several steps a user can undertake to back-up and avoid the accidental loss of data. These steps are optional and are not necessary for the upgrade to take place, but we strongly recommend that all customers take these necessary precautions.

Back up the CMS/APS database

To backup the CMS/APS database do the following:

1. Go to **Start > Programs > Crystal Enterprise > Central Configuration Manager**.
2. Stop all Crystal Enterprise services.
3. Back up the CMS/APS database noting where the database currently resides.
4. Ensure you have a user account that has CREATE, UPDATE and DELETE rights to the database you have chosen to house your system database.

Back up the file repository

To backup the file repository servers (FRS) do the following:

1. Go to **Start > Programs > Crystal Enterprise > Central Configuration Manager**.
2. Stop all Crystal Enterprise services.
3. Back up the FRS noting the current FRS settings in the CMC and Central Configuration Manager such as the current path to the root directory.

One way you can upgrade is by doing a clean install of BusinessObjects Enterprise XI on a staging server. Test the install with the included report samples, (or use your own sample reports), and then migrate the database and objects from the previous installation.

Make sure you are logged into the machine as a local administrator before doing any installations. Experience shows that domain users who are members of the local admin group frequently have reduced rights. For best results, install as local administrator.

Read and understand the BusinessObjects Enterprise XI [release notes](#).

Considerations for migration

When performing an upgrade to BusinessObjects Enterprise XI—regardless of the platform—there are a number of items to consider. Please read this section carefully prior to installing the product. More information on upgrading to BusinessObjects Enterprise XI is available in the [installation guide](#). And we strongly recommend that users read the [release notes](#) prior to installing BusinessObjects Enterprise.

LDAP authentication

In the case where a system uses a lightweight directory access protocol (LDAP) provider for authentication, users must first configure the LDAP wizard in the BusinessObjects Enterprise XI system. Administrators can setup the LDAP plug-in via the Central Management Console (CMC). This must occur prior to migration.

Please review the [Large Repository](#) section of this whitepaper for more details on LDAP migration.

Performance

For Crystal Enterprise deployments, the import process involves multiple steps. This may increase the amount of time it takes to move a repository, including migrating reports, report instances, business views, and schedules to BusinessObjects Enterprise XI. During a Crystal Enterprise upgrade, process report files and their instances are opened and re-saved into the BusinessObjects Enterprise XI system. By re-saving, you update the report to support the latest Crystal Reports print engine (CRPE). This may result in the migration taking a considerable amount of time depending on the size of the implementation.

A patch is available to decrease the amount of time required. Be sure to check that the patch is installed prior to upgrading. To get access to this patch, speak with your customer assurance representative. Please note that while Windows English deployments will need to install this patch, Windows multi-lingual and Solaris deployments will not. To determine if you have the Enterprise XI English build, click **Start**, and click **Programs**. If you have a **BusinessObjects 11** folder, you have the English build. A **BusinessObjects XI** folder is created for the multi-lingual build.

In addition, customers that have a large number of business views may slow performance in the import wizard. Business views are a culmination of multiple of Info Objects. For example, a single business view could be made up of 19 Info Objects. The wizard will bring each

Info Object across separately while maintaining dependencies. Customers should plan for this decrease in performance.

UNIX deployments

When migrating from a UNIX deployment using the import wizard, users must map the windows drives to a UNIX system. Because the import wizard is a Win32 application it requires this mapping for FRS migration.

Supported CMS & reporting database platforms

With BusinessObjects Enterprise XI, some databases have been deprecated or are only supported with the latest service packs. We strongly recommend that customers review the [supported platforms](#) document.

Custom Crystal Server Pages

If an environment has customized some Crystal Enterprise standard web pages (.csp pages such as available.csp) we strongly recommended that you back up these files because the new install may replace them with their standard versions.

In addition, .csp has been deprecated in the BusinessObjects Enterprise XI release. It is therefore recommended that customers begin to migrate their .csp pages to either JAVA or .NET technologies. BusinessObjects Enterprise XI will continue to support .csp for those customers with custom applications.

Large repositories

Migrating large repositories (over 40,000 instances) may take some time – you should be prepared for migration to take upwards of one day, depending upon a number of factors. A majority of all large upgrades can be done in less than a weekend. One such factor is the number of Crystal reports instances in the repository. Because the migration needs to update the engine for each report and report instance, this can cause some performance delays. Please see the [Performance](#) section of this document for more details.

Another factor to consider during migration of large repositories is the use of an alternate authentication provider such as LDAP. Before a customer imports their data set, they should update all third-party groups that they have mapped to their original system. Go to the third-party authorization tabs in the CMC that you have configured, click **Update** at the bottom. This will delete any third-party alias on all users/groups in BusinessObjects Enterprise that no longer exist in their respective third-party systems. Cleaning up these orphaned aliases will speed up migration because the upgrade process will no longer be looking for these users in the third-party systems (since they no longer exist). Furthermore, it will also ensure that the connection information to

the third-party system is still valid, allowing us to get aggregation information for user/groups during migration.

Finding more information

For more information and resources, refer to the product documentation and visit the support area of the web site at:

<http://www.businessobjects.com/>

This section lists titles and links to additional material. If possible, provide a short description with each resource. You will probably end up providing a lot of cross-references in this section.

► www.businessobjects.com

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