BUSINESS OBJECTS®

Crystal Enterprise

Upgrading from CE9 to CE10 - Microsoft Windows

Overview

This document is intended to assist you upgrade from a Crystal Enterprise (CE) 9 system to a CE 10 system.

NOTE:	The scenario outlined in this document is a basic upgrade in **a non-production environment**. 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.

Contents

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 new report format

- Things to consider when upgrading

- Steps to perform an upgrade

There are some differences between the components and database structures of CE 9 and CE 10 so all CE components will be overwritten during an upgrade, however, the users and objects will transfer over completely. Please note that a UNIX upgrade will not be discussed in this document.

Before the upgrade

There are several things you should consider before beginning an upgrade from CE 9 to CE 10

Back up your Data

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

Be sure to back up the CE 9 Automated Process Schedulers (APS) database and 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>:\Program Files\Crystal Decisions\Enterprise 9\FileStore\Input and the output FRS content (instances) is located at <drive>:\ Program Files\Crystal Decisions\Enterprise 9\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 9 environment to a new install of CE 10 rather than doing an upgrade install of CE 10 over an existing install of CE 9.

Benefits of this method include the facts that

- the CE9 system remains working and accessible to users during the installation and testing process,

- you will not lose data or reports if you have to spend time resolving issues and

- the new CE10 system can be tested with a small subset of reports and users. This is especially important when the environment spans several computers, the web server is on a separate computer from the rest of the CE services, you deploy an application server, or there is a firewall involved.

 In this case, a new install of CE 10 is done on a computer that does not have CE on it. Then the database and objects from CE 9 are migrated into the new CE 10 system.

Release Notes

It is critical that you read and understand the Release Notes for CE 10. The Release Notes are located on the root of the CE 10 installation disk or you can find them at http://support.businessobjects.com/search by searching for the file name ce10_release_en.zip

Things to consider

When performing an upgrade from CE 9 to CE 10, there are a number of important things to consider. Please read this section carefully prior to beginning your install. More information on upgrading CE is available in the Release Notes located on the CE 10 installation disk. Business Objects strongly recommends that you read the Release Notes prior to installing CE.

Administrator Rights

Ensure that you do all installations while logged on to the computer as local administrator. Experience has shown that domain users that are members of the

local administrator group can have reduced rights. For best results, install as local administrator.

Crystal Analysis 9

If Crystal Analysis 9 is installed on the computer then the CE 10 install will warn you to upgrade to the latest version of Crystal Analysis. The install will still continue and existing *.CAR files will be successfully migrated, however, users will not be able to view them until Crystal Analysis 10 has been installed.

Custom CSP pages

If an environment has customized some CE standard web pages, for example .CSP pages such as available.csp, it is strongly recommended that these files be backed up as the new install may replace them with standard pages.

Solution Kits

If you have deployed a CE Solution Kit such as SAP, Siebel, Baan, PeopleSoft, or MSCRM, CE 10 should NOT be installed until you have obtained an updated copy of the Solution Kit for version 10. These solution kits are typically not available for several months after the release of CE 10. For further information, contact your Business Objects Sales Representative.

Multiple Servers

If your existing CE 9 deployment has multiple servers of the same type, only one server will be upgraded. The additional instance will appear in the Crystal Configuration Manager (CCM), but it will not be associated with a valid version number, and you cannot start it. You must re-add the second server through the CCM or CMC.

Mixed versions of CE

When you upgrade CE, upgrade all components. Business Objects does not support systems in which older server components are run with an upgraded APS / Crystal Management Server (CMS). For example, using CE 9 Page Servers with a CE 10 CMS.

Supported Database Platforms

With the release of CE 10, some databases have been deprecated or are only supported with the latest Service Packs. Crystal Decisions strongly recommends that you review the Platforms document (Platforms.txt) located on the CE disk. For the most up to date supported platforms list, go to http://support.businessobjects.com/search and search for the file name ce10_supported_platforms.pdf

The Upgrade

You do not need to uninstall a previous version of CE before upgrading. If you do chose to uninstall you may lose all the users and objects that you currently have in CE 9.

If you do not have the newest Windows installer service, CE will install it and request that you restart your computer.

Because the CE 10 Crystal Management Server (CMS) database is quite different from the CE 9 APS database in structure so you cannot use the existing CE 9 APS database but must migrate to the new structure.

Overview

This section outlines the four basic stages of upgrading from CE 9 to CE 10:

1. Specify which directory you want to install CE to.

2. Specify where your new CMS database is located.

3. Copy new CE 10 files to the specified location.

4. Copy data from the old APS database to the new CMS database.

NOTE:	If you have Crystal Analysis 9 installed on your computer, you will be warned that you must upgrade to Crystal Analysis 10 after the CE upgrade. For more details, refer to the Crystal Analysis 9 section of this document

Begin Install and Specify Install Directory

Before the upgrade begins, CE 10 looks for an existing installation of CE 9 and prompts you to do a new install or an upgrade install.

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.

Figure 1 illustrates the next install screen that appears. The first task is to select the installation directory.

Specify new CMS database type and location

Once the install directory is selected, you must select what kind of CMS database you want to use with CE 10. Because the database structure of the CE 10 CMS database is different than the CE 9 APS database, the install automatically asks for database information.

You have two choices when specifying the new CMS 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 10.

If you want to use a supported database on a database server that is different from the CMS computer, select **Option A**. If you have the default MSDE database or Microsoft SQL Server installed on the computer that you are

installing the CMS on and you want to use it as the CMS database, choose
Option B.

In Figure 1, 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
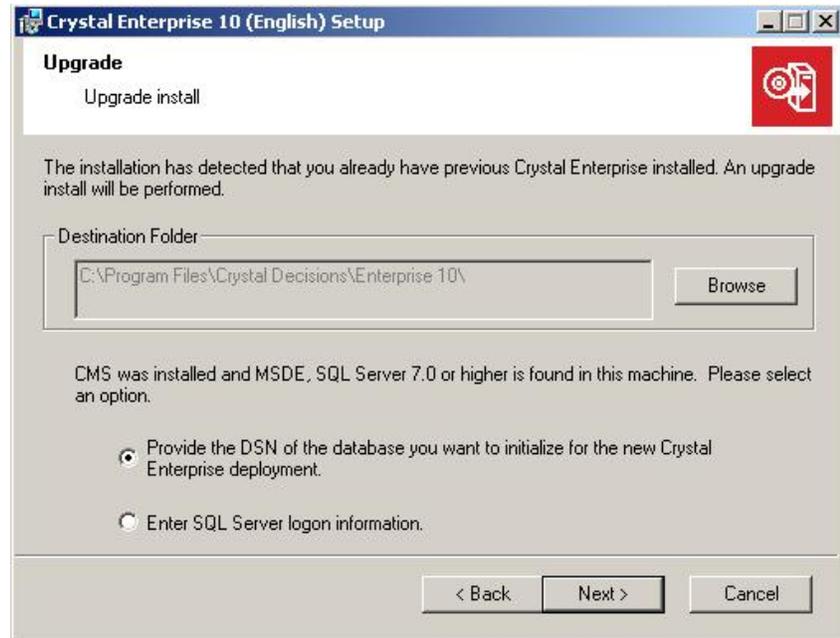not have the option to enter SQL Server logon information.

Figure 1

If you want to point to a supported database other than MSDE then you should
choose the first option. Both options will be detailed below. Choice A is going
through a DSN and Choice B is using MSDE or SQL Server.

Both options A and B outline the second major step in the upgrade process,
which is specifying the location of the new CMS 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 2.
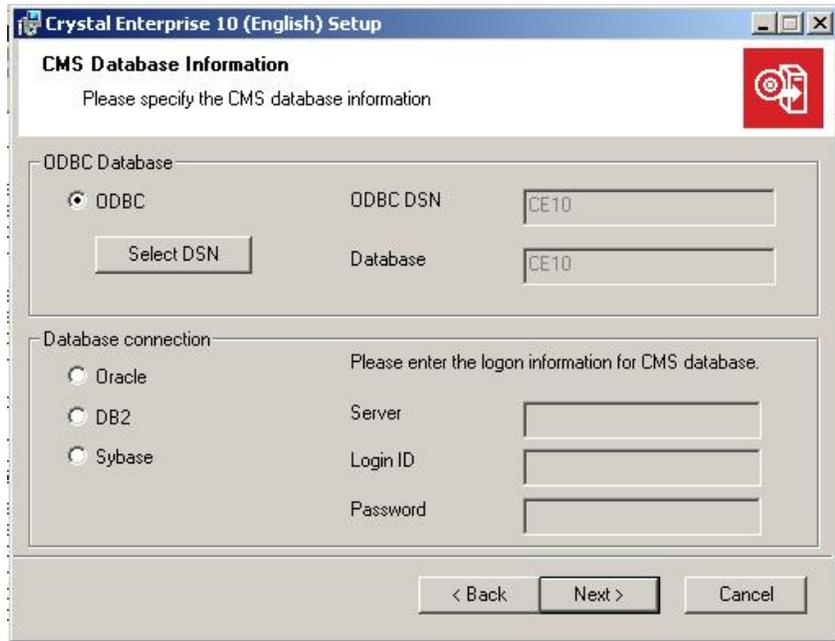
Figure 2

To connect successfully to a supported database through 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 3). Click the **Computer Data Source** tab for a list of existing DSNs.
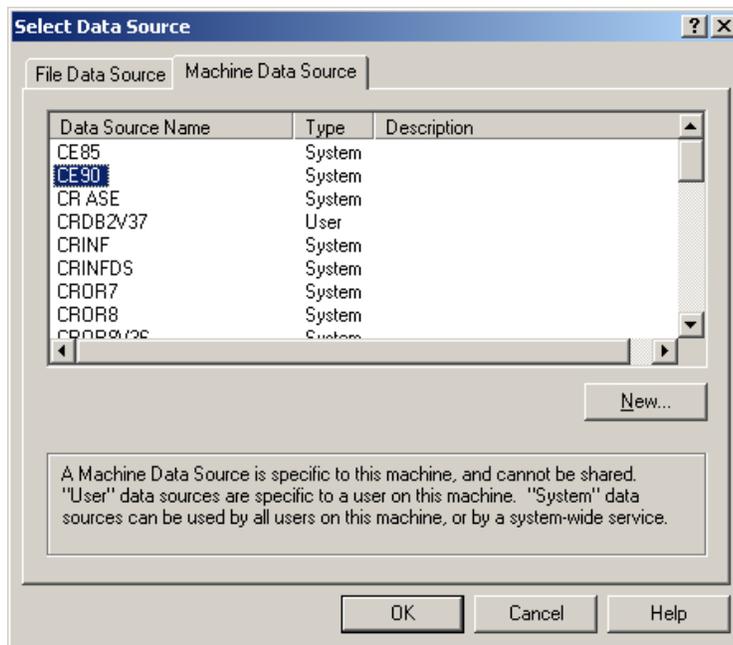
Figure 3

NOTE:	Do not select the CE 9 DSN from the list of existing DSNs. Selecting this DSN will work as a connection to the CE 10 database but the DSN will not be renamed to CE 10. Because the DSN will still be called CE 9, 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 10 files into the install directory you specified.

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

If you make this selection, the following box appears.
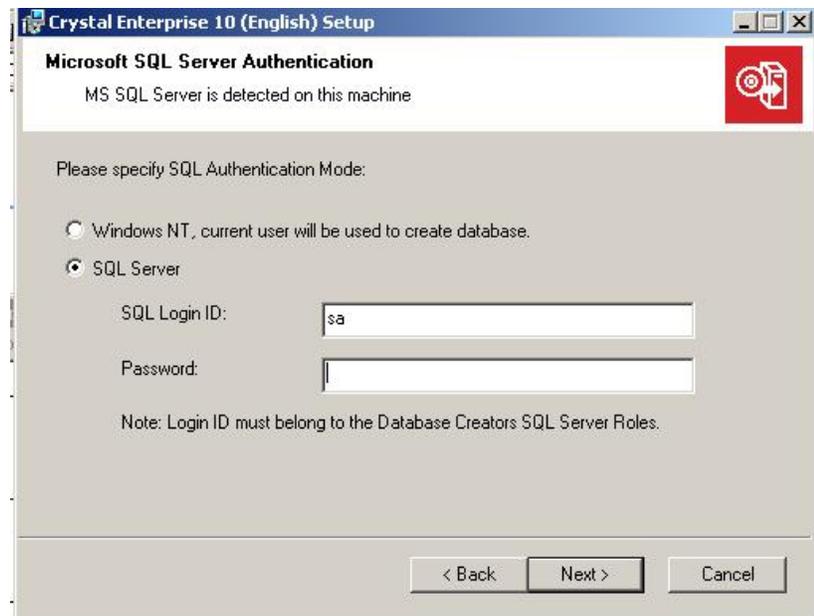
Figure 4

Depending on which authentication type you select from the box in Figure 4, 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 10 files to the install directory

After the creation of the DSN, the install starts to copy the new CE 10 files into the install directory you specified. When the files are successfully copied, the screen in Figure 5 appears.
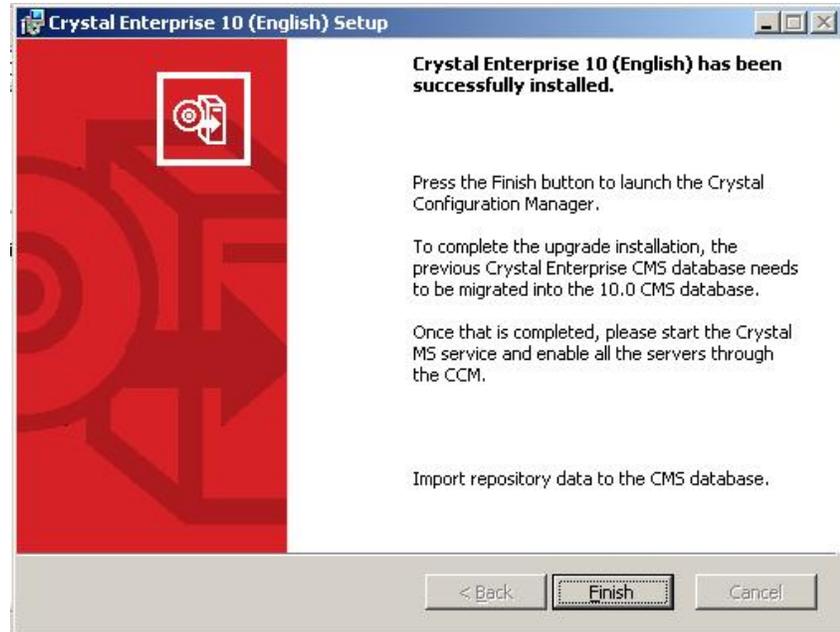

Figure 5

Copy data to the new CMS database

Up to this point you have created a new DSN for the CE 10 CMS database, specified the authentication type and location of the system database, and installed new CE 10 files. However, no data from the CE 9 system has been copied to this new database. That is the next step.

The following steps outline how to copy data from you existing CE 9 APS database to your new CE 10 CMS database.

When you click **Finish** on the screen shown in Figure 5, the screen shown in Figure 6 appears.
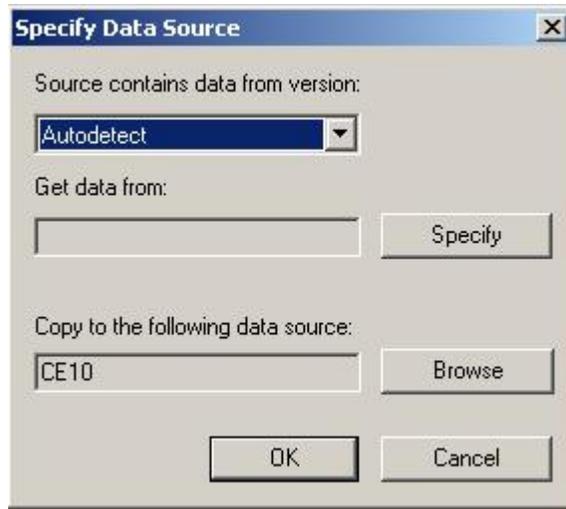
Figure 6

When upgrading from CE 9 to 10 you would choose the Source as CE 9. Then you must point to the actual APS database to retrieve the CE 9 database and migrate it over to CE 10.

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 **CMS database setup completed**. Click **OK** on this screen and then open the CCM. Start the CMS 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 7.

Figure 7

Once the migration of the database is completed, all the Crystal services must be restarted and enabled and the objects in the CMS must be updated to the new Crystal Reports 10 report format.

 This opens the box shown in Figure 8.

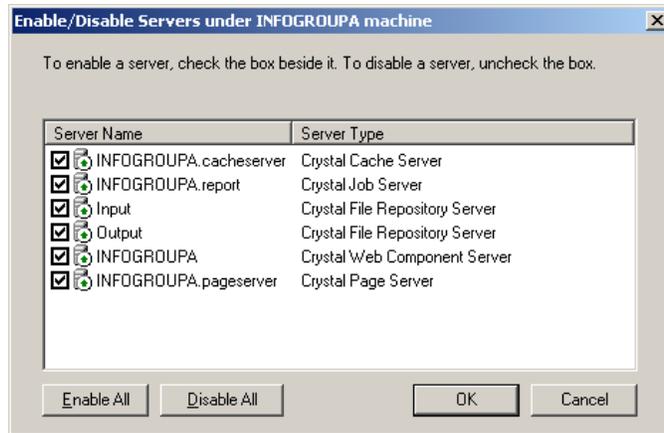Click the **Enable All** button and then click **OK**.

Figure 8

Once all the servers have been enabled and restarted, the objects need to be updated to the new report format. To do this click the **Update Objects** button as shown in Figure 9.
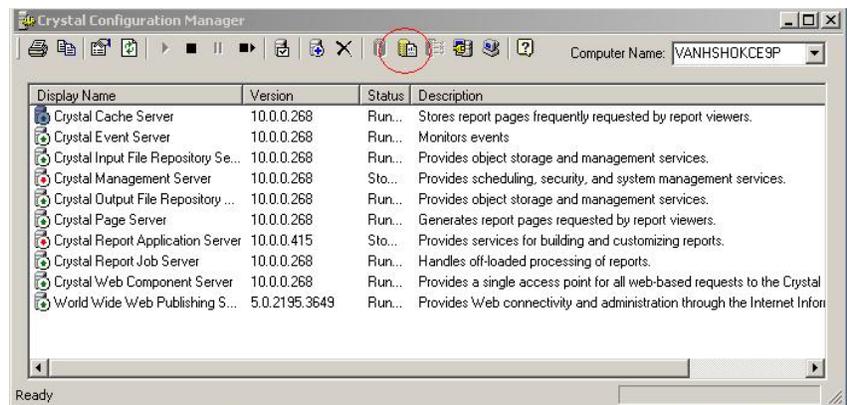

Figure 9

A dialog box similar to Figure 10 will appear. Click **Update** to update the objects.
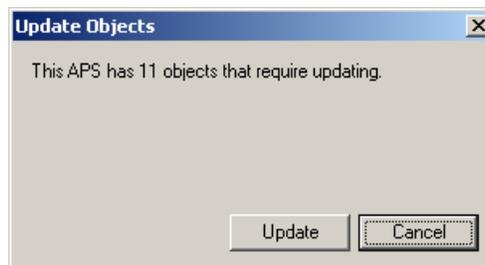

Figure 10

The system is now upgraded to CE 10.

ce9_to_ce10_upgrade.pdf

Contacting Business Objects 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.

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