

Crystal Enterprise 8.5 Instance Migration

Understanding the Enhanced Crystal Import Wizard

Overview

The purpose of this document is to outline the use and limitations of the Enhanced Crystal Import Wizard, which facilitates the migration of report instances from a Seagate Info (SI) 6.x or 7.x environment to Crystal Enterprise (CE) 8.5.0.806.

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Introduction

What is the Enhanced Crystal Import Wizard?

The Enhanced Crystal Import Wizard allows users to migrate report instances from Seagate Info (SI) 6.x and 7.x to Crystal Enterprise (CE) 8.5.0.806. The Crystal Import Wizard will also import instances from CE 8.0.2.672 and 8.5.0.806 to CE 8.5.0.806.

Seagate Info (SI) 6.x and 7.x

The Enhanced Crystal Import Wizard will allow administrators to migrate the following objects to a CE 8.5.0.806 environment:

Source	Destination	Objects
SI 6.x	CE 8.5.0.806	Successful Instances only
SI 7.x	CE 8.5.0.806	Successful Instances only

The Crystal Import Wizard will migrate successful instances to the CE 8.5.0.806 environment. As there are some differences in scheduling capabilities between the SI and CE platforms, recurring schedules will not be created dynamically within the CE 8.5.0.806 environment. However, information about recurring jobs will be written to a log file so that the schedules can be created in the CE environment either manually or via a .CSP script. The log file will be discussed in a section later in this document.

Crystal Enterprise (CE) 8.0.2.672 and 8.5.0.806

When migrating instances between CE environments, both successful and recurring instances may be migrated:

Source	Destination	Objects
CE 8.0.2.672	CE 8.5.0.806	Successful Instances Recurring Instances
CE 8.5.0.806	CE 8.5.0.806	Successful Instances Recurring Instances

How to get the Enhanced Crystal Import Wizard

To take advantage of the increased functionality of the Enhanced Crystal Import Wizard you must apply the Crystal Enterprise 8.5 Common Monthly Hot Fix. To get this hot fix, go to <http://support.crystaldecisions.com/downloads> and use the drop-down list boxes to specify a search for Crystal Enterprise 8.5 English Hot Fixes. This search returns a list of all hot fixes for CE 8.5. Download and install the hot fix called **Crystal Enterprise 8.5 Common Monthly Hot Fix**.

Important	After downloading the Crystal Enterprise 8.5 Common Monthly Hot Fix zip file, read the included Portable Document Format file (PDF) for information on required dependencies.
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Crystal Import Wizard Pre-migration Tips

To successfully import from SI, the Windows NT user logged on to the CE 8.5 computer, must have access to the Input folder and any other directory in which report files or templates reside in the SI environment.

- In SI 6.x, the default Input directory is: \\computername\cinfo\input
- In SI 7.x, the default Input directory is: \\computername\si\input

It is not necessary for the Windows NT user to have access to the Input folder used by the Input File Repository Server in the CE 8.5 environment, as CE will perform the necessary copying. Whether CE 8.5 is running on Windows or Unix has no relevance.

Using the Enhanced Crystal Import Wizard

In order to import instances from SI, launch the Crystal Import Wizard from the Crystal Enterprise Program Group. Using the Wizard is a simple process with four major steps:

1. Select the Source Environment
2. Select the Destination Environment
3. Select the Objects to migrate
4. Review the Import Wizard log file(s) after migration has occurred

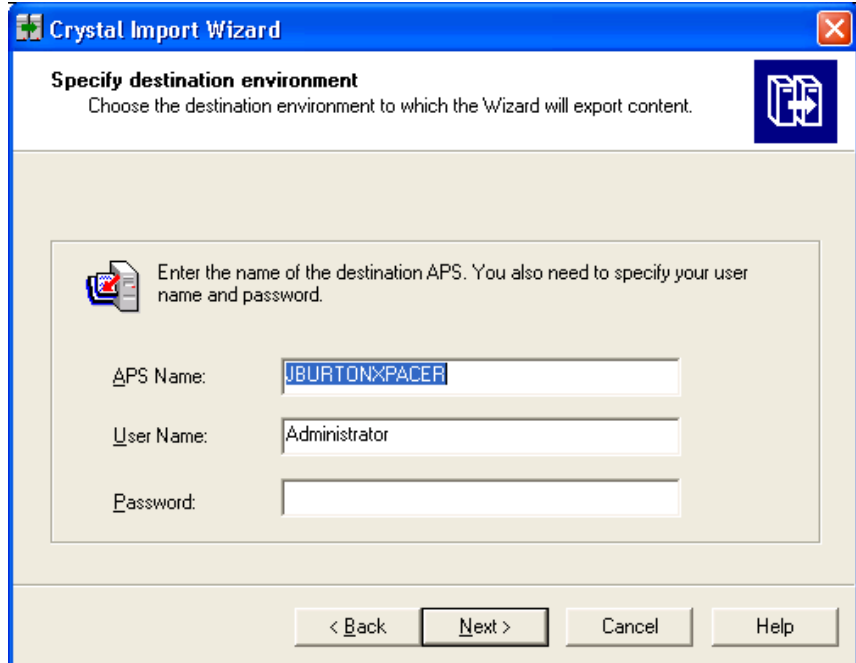
1. Select the Source Environment

Select the 'Source' product and version, enter the 'APS Name', and then enter a valid 'User Name' and 'Password' that is a member of the Administrators group on the Source system. Click 'Next >'.

The screenshot shows the 'Crystal Import Wizard' dialog box with the 'Specify source environment' step. The dialog has a blue title bar and a close button in the top right. Below the title bar, the text reads: 'Specify source environment' and 'Choose an existing Seagate Info environment from which the Wizard will import user/group and report/folder information.' To the right of this text is a blue icon with a white arrow pointing right. Below this is a 'Source:' dropdown menu with a list of options: 'Seagate Info 7.x', 'Seagate Crystal Info 6', 'Seagate Info 7.x' (highlighted), 'Crystal Enterprise 8', and 'Crystal Enterprise 8.5'. To the left of the dropdown is a document icon and the text 'Enter the name and password.' To the right of the dropdown is the text 'user name'. Below the dropdown are three text input fields: 'APS Name:' with the value 'crystal-pe4nebo', 'User Name:' with the value 'administrator', and 'Password:' with a masked password 'XXXXXXXXXXXXXXXX'. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

2. Select the Destination Environment

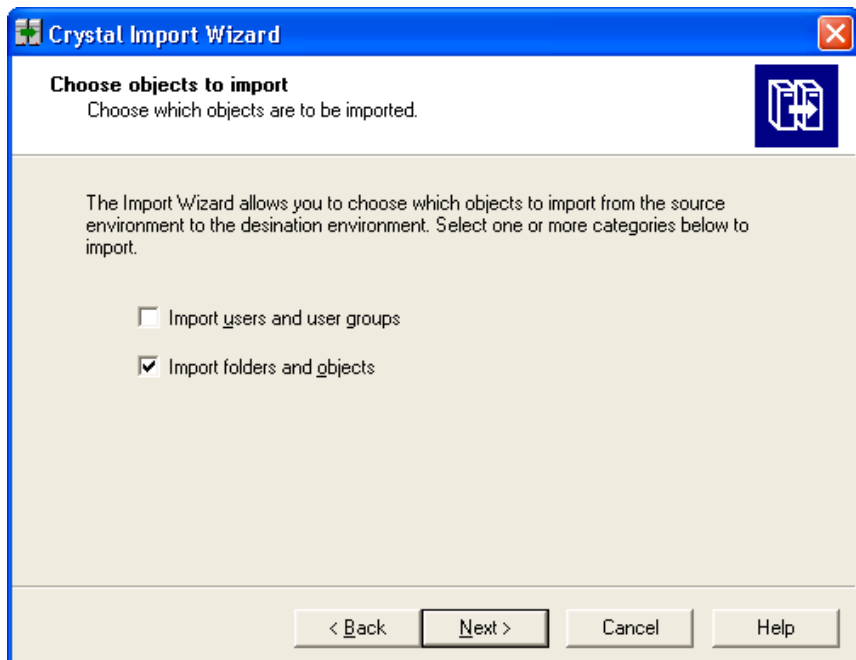
Enter the 'APS Name' of the Destination APS (CE 8.5), and then enter a valid 'User Name' and 'Password' that is a member of the Administrators group on the Destination system. Click 'Next >'.



The screenshot shows the 'Specify destination environment' dialog box in the Crystal Import Wizard. The title bar reads 'Crystal Import Wizard'. The main heading is 'Specify destination environment' with the instruction 'Choose the destination environment to which the Wizard will export content.' Below this, there is a text box with the instruction: 'Enter the name of the destination APS. You also need to specify your user name and password.' There are three input fields: 'APS Name' containing 'JBURTONXPACER', 'User Name' containing 'Administrator', and an empty 'Password' field. At the bottom, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

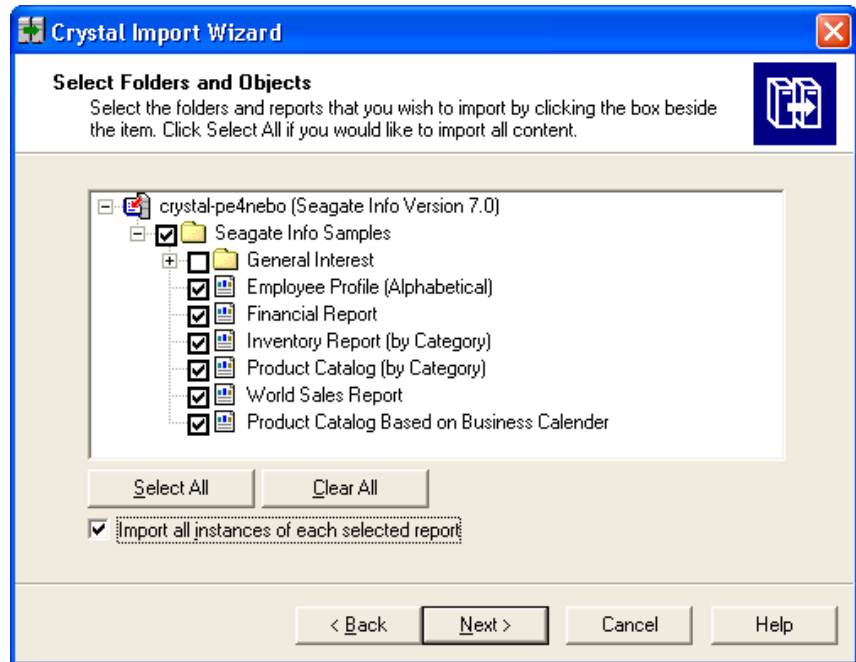
3. Select the Objects to migrate

Once validated, the 'Choose objects to import' dialog will appear. Select which types of objects you wish to migrate. In this example, we will only select 'Import folders and objects'. Click 'Next >'.



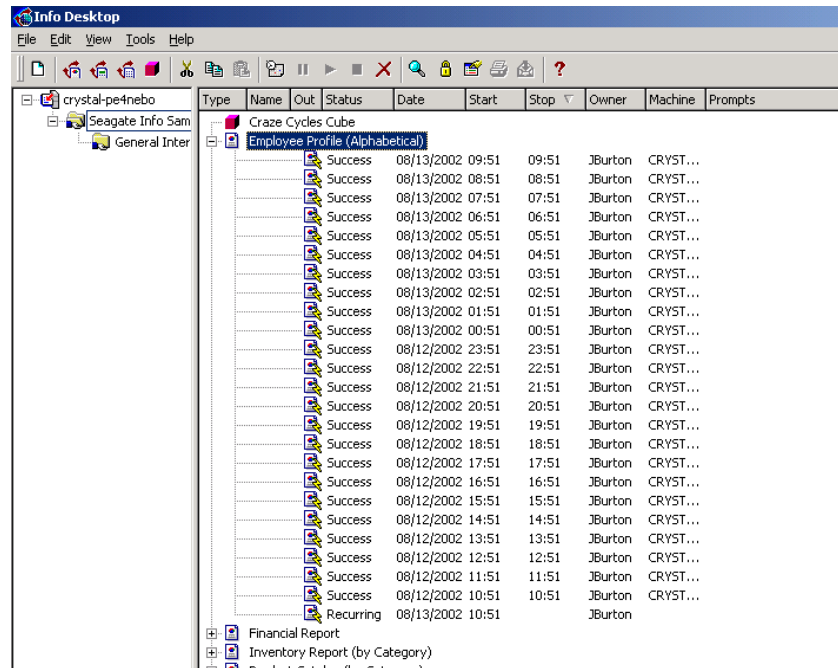
The screenshot shows the 'Choose objects to import' dialog box in the Crystal Import Wizard. The title bar reads 'Crystal Import Wizard'. The main heading is 'Choose objects to import' with the instruction 'Choose which objects are to be imported.' Below this, there is a text box with the instruction: 'The Import Wizard allows you to choose which objects to import from the source environment to the destination environment. Select one or more categories below to import.' There are two checkboxes: 'Import users and user groups' (unchecked) and 'Import folders and objects' (checked). At the bottom, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

The 'Select Folders and Objects' dialog will be displayed. Select the object(s) you want to migrate to the CE 8.5 environment.

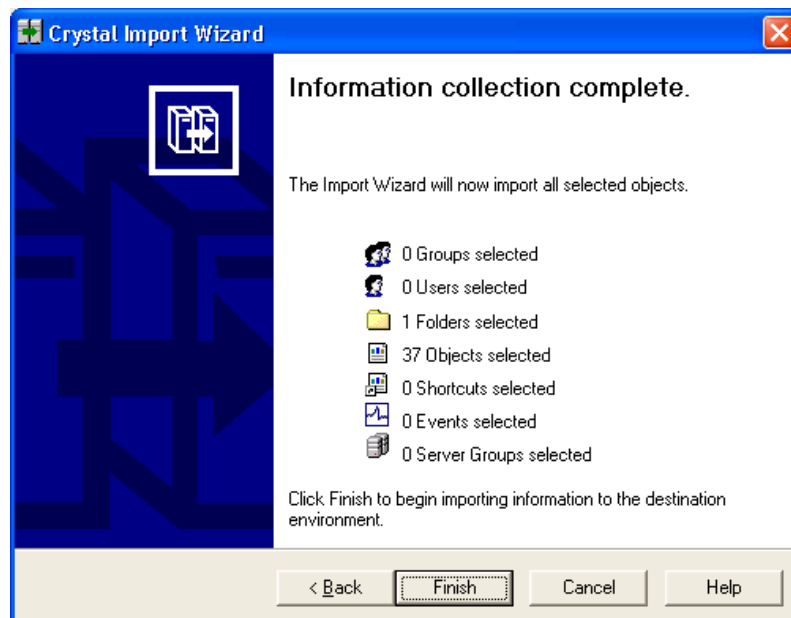


It is important to ensure that you select the 'Import all instances of each selected report' checkbox in the 'Select Folder and Objects' dialog. In this example, only the "Seagate Info Samples" folder and the objects within the folder will be imported. The "General Interest" folder is not selected, and therefore will be excluded from importing. Click 'Next >'.

In the SI system, this same Folder > Object > Instance structure appears as follows in the Info Desktop:

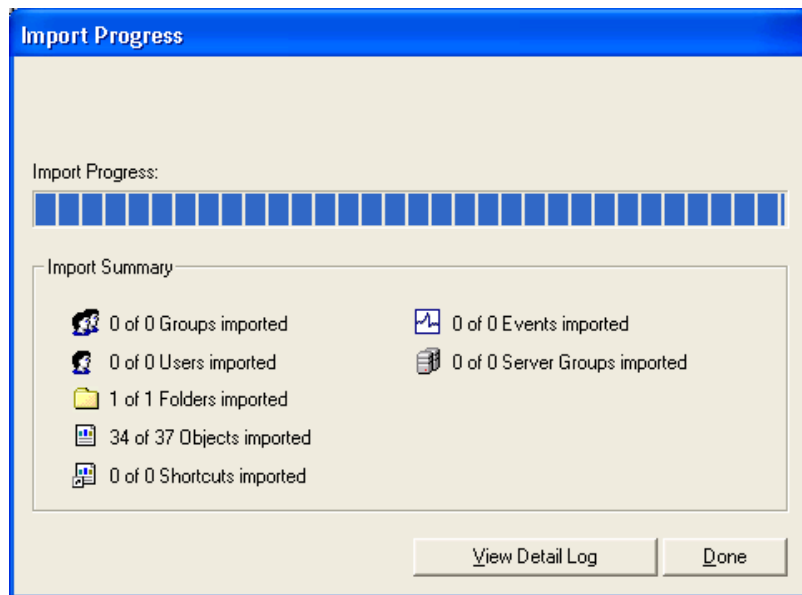


After selecting the objects that you want to migrate, the following summary dialog will be displayed listing the number and types of objects that will be migrated. Notice that “Instances selected” is not listed. Instead, the number of instances being migrated is included in the count of “Objects selected”. You may want to print this screen to use as a reference.



Click ‘Finish’ when you are ready to begin importing information to the Destination environment.

The Crystal Import Wizard will start migrating the objects to the CE 8.5 environment and an 'Import Progress' dialog, similar to the following, will appear.



4. Review the Import Wizard log file(s) after migration has occurred

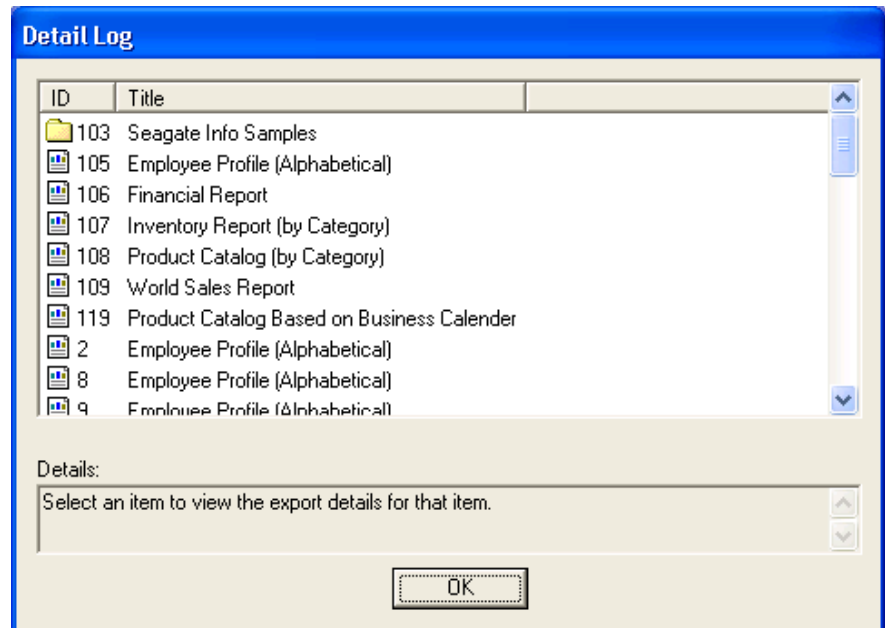
When the migration is complete, it is important to review the 'Import Summary' in the 'Import Progress' dialog. In the above example, note that it indicates, "1 of 1 Folders imported". However, it indicates, "34 of 37 Objects imported". Compared to the list provided before the migration (which you may have printed as a reference), only some of the objects were migrated. The majority of objects were successfully migrated to the CE 8.5. To determine which objects were not migrated, and why, review the log file by clicking the 'View Detail Log' button. Click 'Done' when ready to close the Crystal Import Wizard.

Understanding the Log File(s)

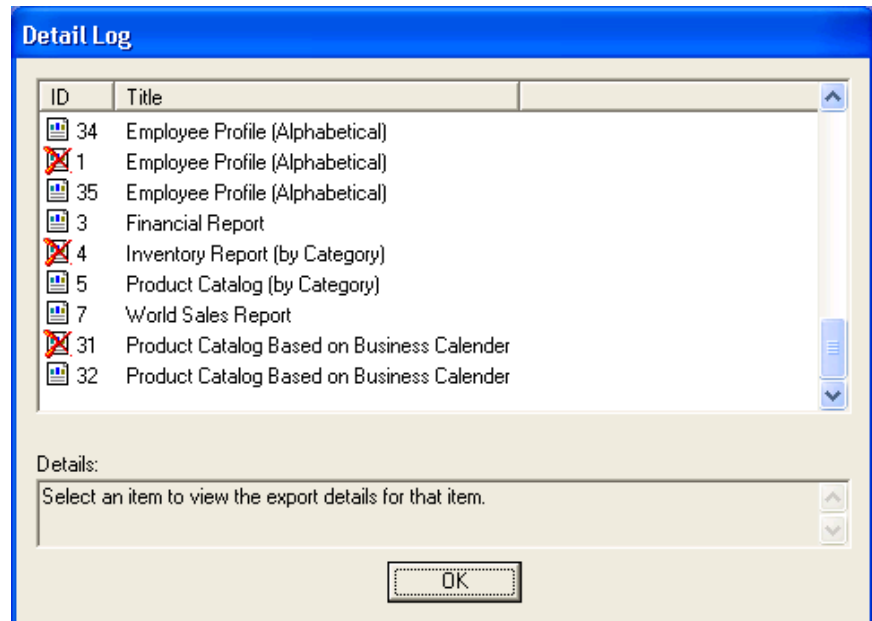
CAUTION	<p>The Detail Log is saved to the following location, by default: <drive>:\Program Files\Crystal Decisions\Enterprise\Win32_x86\ImportWiz.log</p> <p>The ImportWiz.log file is overwritten each time the Crystal Import Wizard is run. Therefore, if you wish to retain the current log for future reference, you should rename it.</p>
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During the import process, the Crystal Import Wizard records each object that it attempts to migrate. The first log file of importance is the log file that is accessible from the Import Progress dialog after the migration has completed (as shown above).

When 'View Detail Log' is clicked, a 'Detail Log' dialog will appear:



Scrolling through the Detail Log, you will notice that some objects have been marked with a red X over the objects icon in the 'ID' column (see below). The Crystal Import Wizard was unable to migrate these objects to the CE 8.5 environment. Therefore, they must be scheduled manually or using a script.



To facilitate the scheduling of objects that could not be migrated dynamically, the Crystal Import Wizard writes to an additional log file, ImpWiz.IDS, which contains information about these particular objects. As noted previously, when migrating from SI 6.x or 7.x, the Crystal Import Wizard will not dynamically recreate schedules for recurring objects. Recurrence information will be found in the ImpWiz.IDS log file.

Import Wizard IDS Log file

The Crystal Import Wizard will write information about recurring objects to a log file. This log file is located, by default, in the following directory:

```
<drive>:\Program Files\Crystal Decisions\Enterprise\win32_x86\
```

The log file is named using the following format:

```
Impwiz_yyymmdd_uniqueidentifier.IDS
```

In the above example, the Crystal Import Wizard log file contains information about the three objects that were not migrated to the CE 8.5 environment.

Each object has its own entry in the log file denoted by an object ID number that correlates to the object ID number written to the Detail Log (shown above).

Each entry contains information about the object such as the object ID, Object Title, Prompt types and values, and Selection formula. The following is a sample of the entries in the log:

```
[ID=1]
```

```
Source_Parent_ID=105
Destination_Parent_ID=630
Title=Employee Profile (Alphabetical)
DBLogon_Info=
Prompts_Info=
Select_Formula=<sf></sf>
Group_Formula=<gf></gf>
Export_Type=CrystalEnterprise.Report
Schedule_Type=Every X hour.
Schedule_Time=08/13/2002 10:51:06
Every_X_Hour=1
Every_X_Min=0
Run_On_Dates=
Except_On_Dates=
Run_On_Days=
Except_On_Days=
```

```
[ID=4]
```

```
Source_Parent_ID=107
Destination_Parent_ID=632
Title=Inventory Report (by Category)
DBLogon_Info=
Prompts_Info=
Select_Formula=<sf>{Product.Product Class} = "Accessory" and not({Product.Product Name} startswith "Craze")</sf>
Group_Formula=<gf></gf>
Export_Type=CrystalEnterprise.Report
Schedule_Type=Template Only.
```

```

Schedule_Time=08/31/2002 10:51:35
Every_X_Hour=0
Every_X_Min=0
Run_On_Dates={StartDate=1/31/1971,EndDate=1/31/1971,Every_year},{StartDate=3/31/1971,EndDate=3/31/1971,Every_year},{StartDate=4/30/1971,EndDate=4/30/1971,Every_year},{StartDate=5/31/1971,EndDate=5/31/1971,Every_year},{StartDate=6/30/1971,EndDate=6/30/1971,Every_year},{StartDate=7/31/1971,EndDate=7/31/1971,Every_year},{StartDate=8/31/1971,EndDate=8/31/1971,Every_year},{StartDate=9/30/1971,EndDate=9/30/1971,Every_year},{StartDate=10/31/1971,EndDate=10/31/1971,Every_year},{StartDate=11/30/1971,EndDate=11/30/1971,Every_year},{StartDate=12/31/1971,EndDate=12/31/1971,Every_year},{StartDate=2/28/2002,EndDate=2/28/2002},{StartDate=2/28/2003,EndDate=2/28/2003},{StartDate=2/29/2004,EndDate=2/29/2004},{StartDate=2/28/2005,EndDate=2/28/2005},{StartDate=2/28/2006,EndDate=2/28/2006},{StartDate=2/28/2007,EndDate=2/28/2007},{StartDate=2/29/2008,EndDate=2/29/2008},{StartDate=2/28/2009,EndDate=2/28/2009},{StartDate=2/28/2010,EndDate=2/28/2010},{StartDate=2/28/2011,EndDate=2/28/2011}
Except_On_Dates=
Run_On_Days=
Except_On_Days=

[ID=31]
Source_Parent_ID=119
Destination_Parent_ID=635
Title=Product Catalog Based on Business Calendar
DBLogon_Info=
Prompts_Info={ValueType=String,Name=Product Category,Prompt=Enter product category you would like to view (Accessories or Bicycles),ReportName=,HasDiscreteValues=Yes,HasRangeValues=No,PickListFileName=,EditMask=,MustPrompt=No,IsNullabe=No,DisallowEditing=No,AllowMultipleValues=No,GroupNumber=0,IsPartOfGroup=No,IsMutuallyExclusiveGroup=Yes,MinimumValue=,MaximumValue=,DefaultValue={{Data=Accessories}},CurrentValue={{Data=Accessories}}}
Select_Formula=<sf>{@class}=?Product Category}</sf>
Group_Formula=<gf></gf>
Export_Type=CrystalEnterprise.Report
Schedule_Type=Template Only.
Schedule_Time=08/14/2002 08:30:18
Every_X_Hour=0
Every_X_Min=0
Run_On_Dates=
Except_On_Dates=
Run_On_Days=
Except_On_Days=

```

Sample Log File Entries

The following are sample entries that illustrate some of the common scheduling scenarios from SI 6.x and 7.x. In the following examples, the date on which migration occurred was June 18, 2002.

Every Day

```
[ID=75]
```

Source_Parent_ID=113
 Destination_Parent_ID=848
 Title=1999 Major League Baseball Schedule
 Schedule_Type=Every day.
 Start_Time=06/19/2002 13:40:06

Every Week

[ID=78]
 Source_Parent_ID=114
 Destination_Parent_ID=849
 Title=Computer Professional - Occupational Comparison
 Schedule_Type=Every Week.
 Start_Time=06/25/2002 13:40:18

Every X hour(s) 3 hour(s) and 12 minutes

[ID=80]
 Source_Parent_ID=116
 Destination_Parent_ID=851
 Title=Credit Card Rates - By Bank
 Schedule_Type=Every X hour.
 Start_Time=06/18/2002 16:52:40
 Every_X_Hour=3
 Every_X_Min=12

Every X month(s) 6 Months

[ID=107]
 Source_Parent_ID=105
 Destination_Parent_ID=887
 Title=Employee Profile (Alphabetical)
 Schedule_Type=Template Only.
 Start_Time=12/18/2002 15:44:26
 Run_On_Dates={StartDate=6/18/2002,EndDate=6/18/2002.},{StartDate=12/18/2002,EndDate=12/18/2002.},{StartDate=6/18/2003,EndDate=6/18/2003.},{StartDate=12/18/2003,EndDate=12/18/2003.},{StartDate=6/18/2004,EndDate=6/18/2004.},{StartDate=12/18/2004,EndDate=12/18/2004.},{StartDate=6/18/2005,EndDate=6/18/2005.},{StartDate=12/18/2005,EndDate=12/18/2005.},{StartDate=6/18/2006,EndDate=6/18/2006.},{StartDate=12/18/2006,EndDate=12/18/2006.},{StartDate=6/18/2007,EndDate=6/18/2007.},{StartDate=12/18/2007,EndDate=12/18/2007.},{StartDate=6/18/2008,EndDate=6/18/2008.},{StartDate=12/18/2008,EndDate=12/18/2008.},{StartDate=6/18/2009,EndDate=6/18/2009.},{StartDate=12/18/2009,EndDate=12/18/2009.},{StartDate=6/18/2010,EndDate=6/18/2010.},{StartDate=12/18/2010,EndDate=12/18/2010.},{StartDate=6/18/2011,EndDate=6/18/2011.},{StartDate=12/18/2011,EndDate=12/18/2011.}

Nth day of every Month

[ID=83]
 Source_Parent_ID=115
 Destination_Parent_ID=850
 Title=Securities Exchange Commission - F50 Financial Data

Schedule_Type=Template Only.
Start_Time=07/01/2002 13:41:01
Run_On_Dates={StartDate=1/1/1971,EndDate=1/1/1971.Every month.Every year.}

Last day of every month

[ID=86]
Source_Parent_ID=105
Destination_Parent_ID=842
Title=Employee Profile (Alphabetical)
Schedule_Type=Template Only.
Start_Time=06/30/2002 13:42:35
Run_On_Dates={StartDate=1/31/1971,EndDate=1/31/1971.Everyyear.},{StartDate=3/31/1971,EndDate=3/31/1971.Every year.},{StartDate=4/30/1971,EndDate=4/30/1971.Everyyear.},{StartDate=5/31/1971,EndDate=5/31/1971.Every year.},{StartDate=6/30/1971,EndDate=6/30/1971.Everyyear.},{StartDate=7/31/1971,EndDate=7/31/1971.Every year.},{StartDate=8/31/1971,EndDate=8/31/1971.Everyyear.},{StartDate=9/30/1971,EndDate=9/30/1971.Every year.},{StartDate=10/31/1971,EndDate=10/31/1971.Everyyear.},{StartDate=11/30/1971,EndDate=11/30/1971.Every year.},{StartDate=12/31/1971,EndDate=12/31/1971.Everyyear.},{StartDate=2/28/2002,EndDate=2/28/2002.},{StartDate=2/28/2003,EndDate=2/28/2003.},{StartDate=2/29/2004,EndDate=2/29/2004.},{StartDate=2/28/2005,EndDate=2/28/2005.},{StartDate=2/28/2006,EndDate=2/28/2006.},{StartDate=2/28/2007,EndDate=2/28/2007.},{StartDate=2/29/2008,EndDate=2/29/2008.},{StartDate=2/28/2009,EndDate=2/28/2009.},{StartDate=2/28/2010,EndDate=2/28/2010.},{StartDate=2/28/2011,EndDate=2/28/2011.}

First Monday of every Month

[ID=87]
Source_Parent_ID=106
Destination_Parent_ID=843
Title=Financial Report
Schedule_Type=First Monday.
Start_Time=07/01/2002 13:42:44

Calendar based on the following days: 6/18/2002, 7/15/2002, 8/28/2002

[ID=89]
Source_Parent_ID=107
Destination_Parent_ID=844
Title=Inventory Report (by Category)
Schedule_Type=Template Only.
Start_Time=07/15/2002 13:43:15
Run_On_Dates={StartDate=6/18/2002,EndDate=6/18/2002.},{StartDate=7/15/2002,EndDate=7/15/2002.},{StartDate=8/28/2002,EndDate=8/28/2002.}

Nth day of every month 1 = nth day

[ID=82]
Source_Parent_ID=117
Destination_Parent_ID=852

Title=Population Statistics - US Census Data

Schedule_Type=Template Only.

Start_Time=09/18/2002 13:40:53

Run_On_Dates={StartDate=6/18/2002,EndDate=6/18/2002.},{StartDate=9/18/2002,EndDate=9/18/2002.},{StartDate=12/18/2002,EndDate=12/18/2002.},{StartDate=3/18/2003,EndDate=3/18/2003.},{StartDate=6/18/2003,EndDate=6/18/2003.},{StartDate=9/18/2003,EndDate=9/18/2003.},{StartDate=12/18/2003,EndDate=12/18/2003.},{StartDate=3/18/2004,EndDate=3/18/2004.},{StartDate=6/18/2004,EndDate=6/18/2004.},{StartDate=9/18/2004,EndDate=9/18/2004.},{StartDate=12/18/2004,EndDate=12/18/2004.},{StartDate=3/18/2005,EndDate=3/18/2005.},{StartDate=6/18/2005,EndDate=6/18/2005.},{StartDate=9/18/2005,EndDate=9/18/2005.},{StartDate=12/18/2005,EndDate=12/18/2005.},{StartDate=3/18/2006,EndDate=3/18/2006.},{StartDate=6/18/2006,EndDate=6/18/2006.},{StartDate=9/18/2006,EndDate=9/18/2006.},{StartDate=12/18/2006,EndDate=12/18/2006.},{StartDate=3/18/2007,EndDate=3/18/2007.},{StartDate=6/18/2007,EndDate=6/18/2007.},{StartDate=9/18/2007,EndDate=9/18/2007.},{StartDate=12/18/2007,EndDate=12/18/2007.},{StartDate=3/18/2008,EndDate=3/18/2008.},{StartDate=6/18/2008,EndDate=6/18/2008.},{StartDate=9/18/2008,EndDate=9/18/2008.},{StartDate=12/18/2008,EndDate=12/18/2008.},{StartDate=3/18/2009,EndDate=3/18/2009.},{StartDate=6/18/2009,EndDate=6/18/2009.},{StartDate=9/18/2009,EndDate=9/18/2009.},{StartDate=12/18/2009,EndDate=12/18/2009.},{StartDate=3/18/2010,EndDate=3/18/2010.},{StartDate=6/18/2010,EndDate=6/18/2010.},{StartDate=9/18/2010,EndDate=9/18/2010.},{StartDate=12/18/2010,EndDate=12/18/2010.},{StartDate=3/18/2011,EndDate=3/18/2011.},{StartDate=6/18/2011,EndDate=6/18/2011.},{StartDate=9/18/2011,EndDate=9/18/2011.},{StartDate=12/18/2011,EndDate=12/18/2011.}

Owner Instance Rights

[ID=411]

Source_ID=103

Source_Parent_ID=0

Destination_Parent_ID=0

Name=Seagate Info Samples

OwnerRights={SrcID=1,DestID=1,Name=Everyone},{SrcID=30,DestID=409,Name=Info Folder Admins}

[ID=412]

Source_ID=105

Source_Parent_ID=103

Destination_Parent_ID=411

Name=Employee Profile (Alphabetical)

OwnerRights={SrcID=2,DestID=2,Name=Administrators},{SrcID=1,DestID=1,Name=Everyone},{SrcID=30,DestID=409,Name=InfoFolderAdmins},{SrcID=31,DestID=-1,Name=InfoDesigners},{SrcID=32,DestID=410,Name=InfoSchedulers},{SrcID=121,DestID=-1,Name=Test Group}

Crystal Import Wizard Limitations

At the current time, the Crystal Import Wizard has been designed to assist in migrating objects to a CE 8.5 environment. There are some known limitations to this application, which should be considered prior to migration.

- Only successful instances will be migrated from SI 6.x/7.x to CE 8.5.
- Recurring objects will be written to the ImpWiz.IDS log file as noted above.
- Due to security concerns, database passwords will NOT be written to the ImpWiz.IDS log file.

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 additional 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>

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