

Crystal Reports Server 2008

Upgrading Your Crystal Reports Server Deployment from XI or XI Release 2 to Crystal Reports Server 2008

Overview

Crystal Reports Server 2008 is a complete reporting solution that enables small to mid-sized businesses to create, manage, and deliver reports over the web. This document explains how to upgrade your system from Crystal Reports Server XI or Crystal Reports Server XI Release 2 to Crystal Reports Server 2008. If you are upgrading from Crystal Reports Server XI Release 2, you must first upgrade to Crystal Reports Server XI Release SP2 or higher before you upgrade to Crystal Reports Server 2008.

All versions of Crystal Reports Server XI and Crystal Reports Server XI Release 2 SP2 and higher are supported for upgrading to Crystal Reports Server 2008.

The focus of this guide is to assist you in upgrading your Crystal Reports Server content and system data from versions of Crystal Reports Server XI and XI Release 2 SP2.

Upgrading consists of replacing components and files from Crystal Reports Server XI or XI Release 2 SP2 with components and files from Crystal Reports Server 2008.

Notes:

If you are upgrading from Crystal Reports Server XI Release 2, you must first upgrade to Crystal Reports Server XI Release SP2 or higher before you upgrade to Crystal Reports Server 2008. For information, refer to *Crystal Reports Server XI Release 2 – Migrating Your Deployment from version XI to version XI Release 2* or *Crystal Reports Server XI Release 2 Installation Guide*.

Importing consists of copying reports, report instances, users, groups, and other objects from one Crystal Reports Server deployment to another.

With this release of Crystal Reports Server 2008, your application server options are Java based. You can choose to install and configure Tomcat

or to configure another Java application server that is supported for this release. .NET application server support will be restored in a future release of Crystal Reports Server.

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Getting Started

Two upgrade options are available to you, depending on your current deployment and your preferred method of updating.

Simple Upgrades

When the Crystal Reports Server 2008 installer detects a simple deployment, you have the option of performing a simple upgrade to Crystal Reports Server 2008. A simple deployment means you installed the complete feature set onto one machine. This includes the client components, the server components, the SDKs, and either the Java or the .NET Web Component Adapter or Web Component Server. During a simple upgrade, the installer will perform the following steps:

1. Installs Crystal Reports Server 2008

2. Points the Crystal Reports Server 2008 Input and Output File Repository Server (FRS) to the location of the existing Crystal Reports Server 2008 XI Release 2 FRSs.
3. Creates a new Crystal Reports Server 2008 CMS database, and then copies the contents of your existing CMS database to the Crystal Reports Server 2008 database.
4. Updates all of the objects in the newly copied CMS database to Crystal Reports Server 2008 objects.
5. Disables the existing Crystal Reports Server XI or XI Release 2 system.

If you perform a simple upgrade to Crystal Reports Server 2008, the installer automatically disables the previous XI or XI Release 2 system. After the upgrade is complete, the installer asks you whether to uninstall the previous system. It is highly recommended that you uninstall the previous version of the system as soon as you have verified that Crystal Reports Server 2008 has successfully installed. If you choose to uninstall Crystal Reports Server 2008 later, you must ensure that the previous version of servers are not re-enabled and not re-started. In particular, enabling the older version of the CMS and File Repository Server will conflict with the Crystal Reports Server 2008 system.

Notes:

- This option is only available to you when upgrading on a Windows computer. If you are upgrading on a Linux computer, you must perform a complex upgrade.
- If you are performing a simple upgrade, the installer stops your existing XI or XI Release 2 CMS database. This means that your existing deployment will not be available during the upgrade process and users will not be able to access Crystal Reports Server.

Complex Upgrades

If the Crystal Reports Server 2008 installer does not detect a simple deployment or if you want to install Crystal Reports Server 2008 and copy content and system data from your existing deployment, you must perform a complex upgrade.

You can install Crystal Reports Server 2008 on the same computer as your existing XI or XI Release 2 system, or on a separate computer.

If you are performing a complex upgrade, you must manually perform the following steps after you've finished installing Crystal Reports Server 2008:

1. Import your existing Crystal Reports Server XI or XI Release 2 content to your Crystal Reports Server 2008 deployment, either by using the Central Configuration Manager (CCM) or by using the Import Wizard.
2. Enable the Crystal Reports Server 2008 services.
3. Add the Search Index Program.

4. Update any events that you copied to the Crystal Reports Server 2008 deployment form your existing Crystal Reports Server deployment.

Your Crystal Reports Server 2008 system can operate at the same time as your existing XI or XI Release 2 system, whether the deployments are on the same computers or not. When you are ready to, you can uninstall the XI or XI Release 2 system.

Notes:

- If you are upgrading from Crystal Reports Server XI Release 2, you must first upgrade to Crystal Reports Server XI Release SP2 or higher before you upgrade to Crystal Reports Server 2008.
- The installation of a MySQL database is provided with the Crystal Reports Server 2008 installation package. You can use a MySQL database to create a new copy of the CMS database for Crystal Reports Server 2008, or you can use any of the other database servers that are supported for the release. You cannot use the same database instance that your previous version of Crystal Reports Server uses.
- Before you copy data to the CMS database, ensure that you have the connection details about the database server that you select, and logon credential information for the account used for connecting to the database instance. The database account requires permissions to add and drop tables, as well as to insert, delete, and update data in those tables.
- If you import events from a Crystal Reports Server deployment, you must run an EventUpdater script to associate the imported events with the destination Central Management Server (CMS).

Upgrading Your Crystal Reports Server System

Preparation

It is highly recommended that you follow your usual administrative practices before upgrading to Crystal Reports Server 2008. However, you should also consider the following common tasks and guidelines:

- Consult the **What's New Documentation** for an overview of changes in Crystal Reports Server 2008
- For further information that may pertain to your reporting environment, consult the **Release Notes** included with your product.
- Disable and subsequently stop all Crystal Reports Server components before upgrading.
- Stop the web servers and/or web application servers that are configured for use with Crystal Reports Server.
- Ensure that you have details about the database server and accounts that are used for the existing system database and that will be used by the new system database.

- Back up your existing repository or repositories, including the system database and Input and Output File Repository Servers.
- Back up any custom web applications, HTML pages, or scripts that you have added to your existing deployment.
- When you install or upgrade Crystal Reports Server components, make sure you log onto the machine as an administrator first. If you are upgrading on a Windows computer, you must log on with an administrator account. If you are upgrading on Linux, you must log on as the same user that installed your previous Crystal Reports Server deployment.
- Close any other programs that are running locally before you start the Crystal Reports Server setup program.

NOTE

Silent installations are not recommended for upgrading. Although you can use a silent installation to add components to a machine, using it to replace existing components is not recommended. Alternatively, you can uninstall the existing components and then install the new ones using the silent installation.

Performing a Simple Upgrade

You can perform a simple upgrade to Crystal Reports Server 2008 if the Crystal Reports Server 2008 installer detects an entire XI or XI R2 deployment on the Windows computer that you are installing Crystal Reports Server 2008 on.

Performing a simple upgrade to Crystal Reports Server 2008 requires the following inputs:

1. Providing information on your existing XI or XI Release 2 Central Management Server (CMS) database.
2. Providing information on the system administrator for the existing deployment.
3. Providing information on the Server Intelligence Agent (SIA).

The Server Intelligence Agent is a component of the Central Management Console (CMC) that simplifies administrative procedures previously carried out by the Central Configuration Manager (CCM), such as the management of CMC server processes. For more information on the Server Intelligence Agent, see the “Managing and Configuring Servers” chapter of the *BusinessObjects Enterprise Server Administration Guide*.

4. Configuring the Crystal Reports Server 2008 CMS database.

Note: The installation of a MySQL database is provided with the installation package. You can use a MySQL database to create a new

copy of the CMS database for Crystal Reports Server 2008, or you can use any of the other database servers that are supported for the release.

5. Configuring the Java application server. You can choose to either install and configure Tomcat or configure any other Java application server that is supported for the release.

The Crystal Reports Server 2008 installer writes the details of your existing deployment to a log file. The name of the file is `boe_upgrade_output.xml`; the `boe_upgrade.xsl` file provides formatting when you open `boe_upgrade_output.xml`. You can use this log file as a reference when you are configuring the server in your Crystal Reports Server 2008 deployment.

The default location of this log file is `C:\Program Files\Business Objects\BusinessObjects Enterprise 12.0\Logging\`.

To select a simple upgrade

Before you start to install Crystal Reports Server 2008, stop all Crystal Reports Server XI or XI Release 2 services through the Central Configuration Manager (CCM).

If the installer detects that you already have a version of Crystal Reports Server XI or XI Release 2 on the computer that you are installing Crystal Reports Server 2008 on, the Crystal Reports Server Upgrade screen appears.

1. Select whether you want to perform a simple upgrade or not.
 - If you want to perform a simple upgrade, select **Yes, perform an upgrade installation**.
 - If you want to perform a side-by-side deployment (a complex upgrade), select **No, do not perform an upgrade installation**. You will skip the next step "To specify the existing CMS database" and will continue with "To specify an installation directory".

2. Click **Next** to continue.

The "Existing CMS Database Information for Upgrade" screen appears.

To specify the existing CMS database

If you chose to perform a simple upgrade, the "Existing CMS Database Information for Upgrade" screen appears. This screen allows you to specify the existing CMS database that you want to copy the data from.

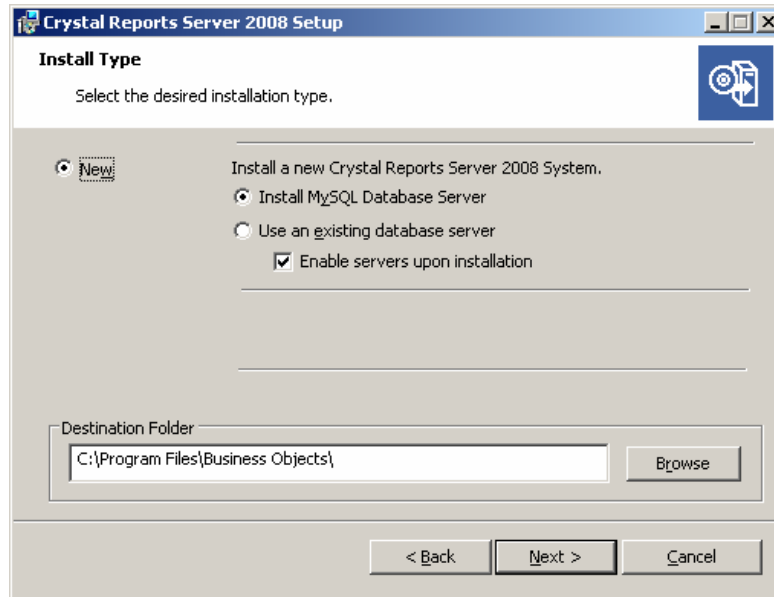
1. From the **Select existing CMS database list**, select the database type of your existing CMS database and enter its credentials.

- a. If you are copying data from SQL Server
 - On the **CMS Database** list, select **SQL Server (ODBC)**.
 - Click the **Browse** tab.
 - Select the Data Source Name.
 - Type the **Login ID** and **Password** for the database, select the database, and then click **Next**.
- b. If you are copying data from Oracle
 - On the **CMS Database** list, select **Oracle**.
 - Type the Oracle tnsnames connect identified in the **Server** field.
 - Type the credentials for the server in the **Username** and **Password** fields, and then click **Next**.
- c. If you are copying data from DB2
 - On the **CMS Database** list, select **DB2**.
 - Type the DB2 database alias in the **Server** field.
 - Type the credentials for the server in the **User Name** and **Password** fields, and click **Next**.
- d. If you are copying data from MySQL:
 - On the **CMS Database** list, select **MySQL**.
 - Type the name of the database in the **Database** field.
 - Type the Host Name in the **Server** field.
 - Type the port that the database uses in the **Port** field.
 - Type the credentials for the server in the **Username** and **Password** fields, and click **Next**.
- e. If you are migrating from Sybase
 - On the **CMS Database** list, select **Sybase**.
 - Type the Sybase Server Name in the **Server** field.
 - Type the credentials for the server in the **User Name** and **Password** fields, and click **Next**.

The “Install Type” screen appears.

To specify an installation directory

The “Install Type” screen is used to select an installation method and to specify an installation directory.



1. Specify whether you want to install a MySQL database server, or if you want Crystal Reports Server to use an existing database server.
2. In the **Destination Folder** field, specify where to install the Crystal Reports Server components.

You must select a different installation directory for Crystal Reports Server 2008 than the directory for your previous Crystal Reports Server deployment. The installer validates the directory that you specify, and prevents you from installing Crystal Reports Server 2008 in the same directory as your existing deployment.

3. Click **Next** to continue with the installation setup.

The “Server Components Configuration” screen is displayed.

To enter information on your existing CMS

The “Server Components Configuration” screen is used to specify the port number and administrator password for the Crystal Reports Server XI or XI Release 2 Central Management Server (CMS). The CMS’s role is to communicate with the other Crystal Reports Server servers and services and to manage the system databases.

Crystal Reports Server 2008 Setup

Server Components Configuration

Please specify the port numbers and the password for the Crystal Reports Server Administrator of the previous installation

Ports

CMS port 6400

Administrator account

Password

Confirm password

< Back Next > Cancel

1. Specify the port number of your existing Crystal Reports Server CMS in the **CMS port** field.
2. Specify the password for the CMS administrator account in the **Password** and **Confirm password** fields.
3. Click **Next** to continue with the installation setup.

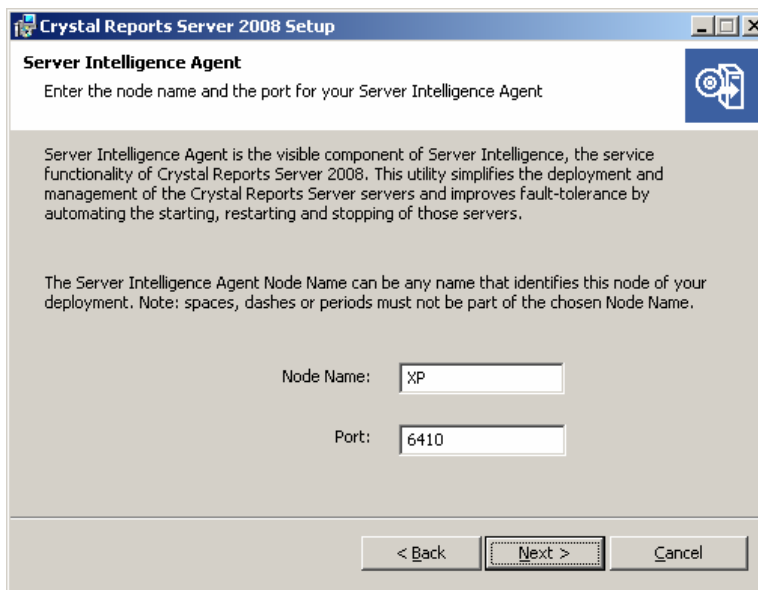
The “Server Intelligence Agent” screen is displayed.

Note: If the port you specified in step 1 is unavailable, you will be requested to specify another port number.

The “Server Intelligence Agent” screen appears.

To specify Server Intelligence Information

The “Server Intelligence Agent” screen is used to name and designate a port address for the Server Intelligence Agent (SIA) for the current installation.



The screenshot shows a Windows-style dialog box titled "Crystal Reports Server 2008 Setup". The main heading is "Server Intelligence Agent". Below the heading, it says "Enter the node name and the port for your Server Intelligence Agent". There is a small icon of a gear and a document. The text explains that the Server Intelligence Agent is the visible component of Server Intelligence, the service functionality of Crystal Reports Server 2008. It simplifies deployment and management of the Crystal Reports Server servers and improves fault-tolerance by automating the starting, restarting and stopping of those servers. It also notes that the Node Name can be any name that identifies this node of your deployment, but spaces, dashes, or periods must not be part of the chosen Node Name. There are two input fields: "Node Name:" with the value "XP" and "Port:" with the value "6410". At the bottom, there are three buttons: "< Back", "Next >" (which is highlighted with a dashed border), and "Cancel".

The Server Intelligence Agent is a component of the Central Management Console (CMC) that simplifies administrative procedures previously carried out by the Central Configuration Manager (CCM), such as the management of CMC server processes. A Server Intelligent Agent is automatically created during the installation of Crystal Reports Server 2008. For more information on the Server Intelligence Agent, see the "Managing and Configuring Servers" chapter of the *BusinessObjects Enterprise Server Administration Guide*.

1. Provide a name to identify the SIA node in the **Node Name** field.
2. Specify a port number for the SIA node in the **Port** field.
This port will be used by the SIA to communicate with the Central Configuration Manager (CCM).
3. Click **Next** to continue with the installation setup.

Once the SIA information is entered, the port number will be validated before you can proceed to configure the CMS database for your installation. A warning will display if the port you specified is not available.

Depending on whether you chose to use MySQL as a CMS database or to use an existing database server, the "My SQL Database Server Configuration" screen or "CMS Database Information" screen appears.

CMS database configuration

To configure your MySQL database server

The "My SQL Database Server Configuration" screen appears if you chose to install MySQL as the database server for your new Crystal Reports Server 2008 deployment.

Crystal Reports Server 2008 Setup
MySQL Database Server Configuration
Configuring the MySQL Database Server

Crystal Reports Server 2008 will install and use a MySQL database to store system data. Please specify the port number, and passwords for the root and CMS user accounts below.

MySQL Port Number: Enable remote root access:

MySQL root User Account		MySQL BusinessObjects User Account	
User:	<input type="text" value="root"/>	User:	<input type="text" value="sa"/>
Password:	<input type="password"/>	Password:	<input type="password"/>
Confirm Password:	<input type="password"/>	Confirm Password:	<input type="password"/>

< Back Next > Cancel

1. In the **MySQL Port Number** field, specify the port number for the MySQL database server.

Note: The default port number is 3306. If the existing CMS database uses port 3306, you must specify a different port number for the Crystal Reports Server 2008 database. You cannot copy content from one CMS database to the other CMS database in the event of a conflict.

2. In the **MySQL root User Account** pane, specify and confirm a password for the MySQL root user account.
3. Select the **Enable remote root access** box to activate remote root access to the database server.
4. In the **MySQL BusinessObjects User Account** pane, specify and confirm a password for the MySQL BusinessObjects user account.
5. Click **Next** to continue the installation setup.

The “Select Web Application Server” screen is displayed.

To configure an existing database server

The “CMS Database Information” screen appears if you choose to use an existing database server as your Central Management Server (CMS) for the new Crystal Reports Server installation. Use this screen to configure the database server.

If you are using an existing database, ensure that you have the connection details about the database server that you select, and logon credential information for the account used for connecting to the database instance. The database account requires permissions to add

and drop tables, as well as to insert, delete, and update data in those tables.

1. Select a database type from the **Select existing CMS database** drop-down list in the **CMS Database** pane.

Depending on your database server selection, corresponding input fields are displayed in the **CMS Database** pane.

2. Provide all the required information for the database in the fields provided in the **CMS Database** pane.

The table below summarizes all the information required for each database type:

Database type	Information required at install time
My SQL	<ul style="list-style-type: none"> • Database: MySQL database name • Server: MySQL server name • Port: default port is 3306 • Login credentials used to access database
Sybase	<ul style="list-style-type: none"> • Server: Sybase Server Name • Login credentials used to access database <p>Note: The Sybase server name is a combination of the host name and the port number which is set by your database administrator in the file sql.ini</p>
DB2	<ul style="list-style-type: none"> • Server : DB2 database alias • Login credentials used to access database
Oracle	<ul style="list-style-type: none"> • Server: tnsnames connect identifier • Login credentials used to access database
Microsoft SQL Server	<ul style="list-style-type: none"> • ODBC DSN

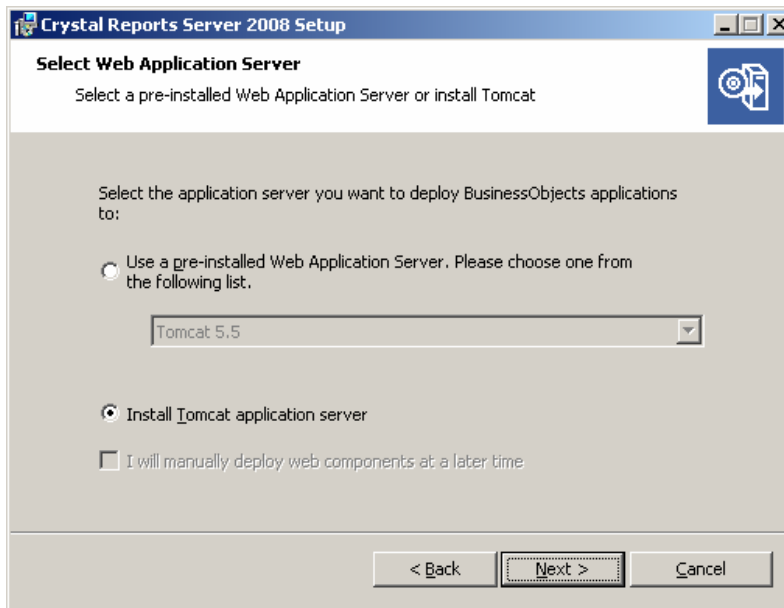
3. Select the **Reset existing database** box to delete all current tables and entries in the existing database.

4. Click **Next** to continue with the installation setup.

The "Select Web Application Server" screen is displayed. The screen only displays if the connection is established with the database configuration you provided.

To select a web application server configuration option

As part of the installation setup, you need to provide information on the Web application server that will work with your BusinessObjects applications such as InfoView, the Central Management Console or your custom applications. Use the “Select Web Application Server” screen to either install Tomcat as your application server, or to work with our existing web application server.



To configure your web application server for Crystal Reports Server you will need account information along with port information.

1. Select one of the following options:

- **Use a pre-installed Web Application Server**
- **Install Tomcat application server**

2. To use your current Web application server you can:

- Specify your server from the drop-down list provided.

Tip: You can configure the server during the current installation setup. You will need to provide access information for this server in a subsequent screen.

Note: Select **Other** if your existing web application server is SAP Application Server 7.0 or JBoss 4.04. If you select this option you will have to manually deploy the web applications.

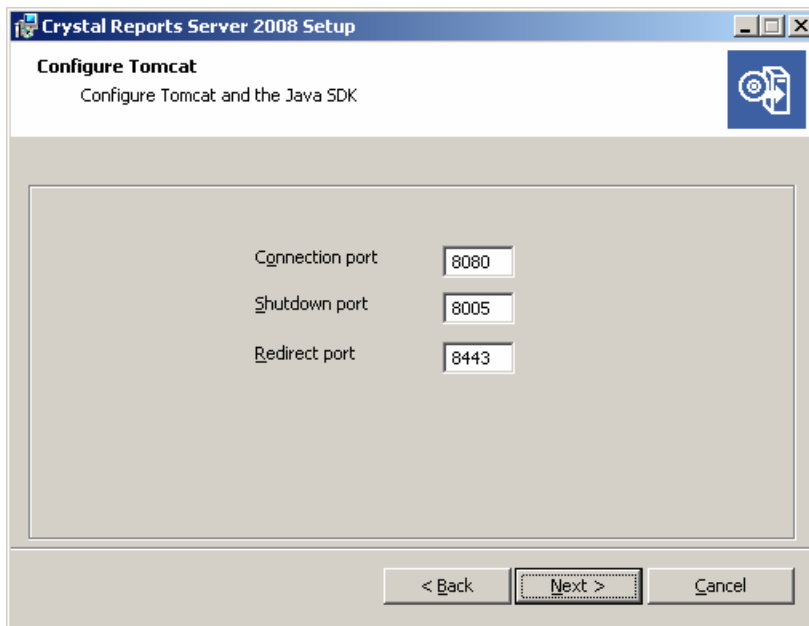
- Choose to manually configure your server at a later time.

3. Click **Next**.

Depending on your selection, you can now proceed to either configure your Web application server, or start the installation process.

To configure your Tomcat application server

The “Configure Tomcat” screen displays during installation setup if you choose to install Tomcat as the Web application server for your Crystal Reports Server installation. Use this screen to configure Tomcat and the Java SDK.



The screenshot shows a Windows-style dialog box titled "Crystal Reports Server 2008 Setup" with the subtitle "Configure Tomcat and the Java SDK". Inside the dialog, there are three labeled text input fields: "Connection port" containing "8080", "Shutdown port" containing "8005", and "Redirect port" containing "8443". At the bottom of the dialog, there are three buttons: "< Back", "Next >" (which is highlighted with a dotted border), and "Cancel".

1. Accept the default values or specify new port numbers for **Connection port**, **Shutdown port**, and **Redirect port**.
2. Click **Next** to continue with the installation setup.

Note: If the port numbers you specified are in use, a warning message is displayed. To continue you will have to specify unused and valid port numbers.

The “Start Installation” screen is displayed.

To configure your existing Web application server

The “Configure Web Application Server” screen displays during installation setup after you specify an existing server in the “select Web Application Server” screen. To properly install web components on your web application server, you must provide specific configuration information about your existing web application server.

1. Specify the required configuration information for your existing web application server.

The table below summarizes the information required for each supported web application server.

Web application server	Information required for installation setup
Apache Tomcat 5.5	<ul style="list-style-type: none"> • Server Instance: Name of the current web application server instance (for example "localhost") • Service Name: Name of the Windows service if the application server will be installed as a windows servier (for example "Tomcat 5") • Application Server Installation Directory: The directory where the web application server is installed (for example C:\wdeploy\appserver\Tomcat5520)
WebLogic 10	<ul style="list-style-type: none"> • Port: Administration port of the application server - mandatory for WebLogic (for example "7001") • Username: User name with administration rights to the application server - mandatory for WebLogic. • Password: Password for account with administration rights to the application server - mandatory for WebLogic • Server Instance: Name of the current web application server instance (for example "mserver1"). • Application Server Installation Directory: The directory where the web application server is installed (for example C:\bea\weblogic10\user_projects\domains\base_doma in). <p>Note: For WebLogic the directory is the domain root.</p>
WebLogic 9	<ul style="list-style-type: none"> • Port: Administration port of the application server - mandatory for WebLogic (for example "7001") • Username: User name with administration rights to the application server - mandatory for WebLogic. • Password: Password for account with administration rights to the application server - mandatory for WebLogic • Server Instance: Name of the current web application server instance (for example "mserver1"). • Application Server Installation Directory: The directory where the web application server is installed (for example C:\bea\user_projects\domains\base_domain). • Note: For WebLogic the directory is the domain root.
WebSphere 6.1	<ul style="list-style-type: none"> • Port: Administration port of the WebSphere application server - the SOAP port. Default SOAP port will be used if not specified.

	<ul style="list-style-type: none"> • Username: User name with administration rights to the WebSphere application server <p>Note: If Admin is Secure is not selected you do not need to specify a username or a password</p> <ul style="list-style-type: none"> • Password: Password for account with administration rights to the application server. • Server Instance: Name of the current web application server instance (for example “server1”). • Virtual Host: The virtual host to which the application must be bound. • Admin is Secure: Select this option to enable security requiring administrative access credentials to the application. • Application Server Installation Directory: The directory where the web application server is installed (for example C:\Program Files\IBM\WebSphere\AppServer).
Oracle Application Server 10g R3	<ul style="list-style-type: none"> • Port : Administration port of the application server – mandatory for Oracle 10g R3 (for example “6003”). This should be the Request port of the <notify-cation-server> element in the open.xml file. • Username: User name with administration rights to the application server – mandatory for Oracle 10g R3. • Password: Password for account with administration rights to the application server – mandatory for Oracle 10g R3. • Server Instance: Name of the current web application server instance (for example “myserver.domain.com”). • Admin is Secure: Select this option only if you want Secure Sockets Layer (SSL) as part of the deployment. • Note: If Admin is Secure is not selected, you will still have to specify the username and password to access the server. • Application Server Installation Directory: The directory where the web application server is installed (for example C:\product\10.1.3\OracleAS_1). • Group Id: Name of the server group to which the target application belongs (for example “Default_group”).

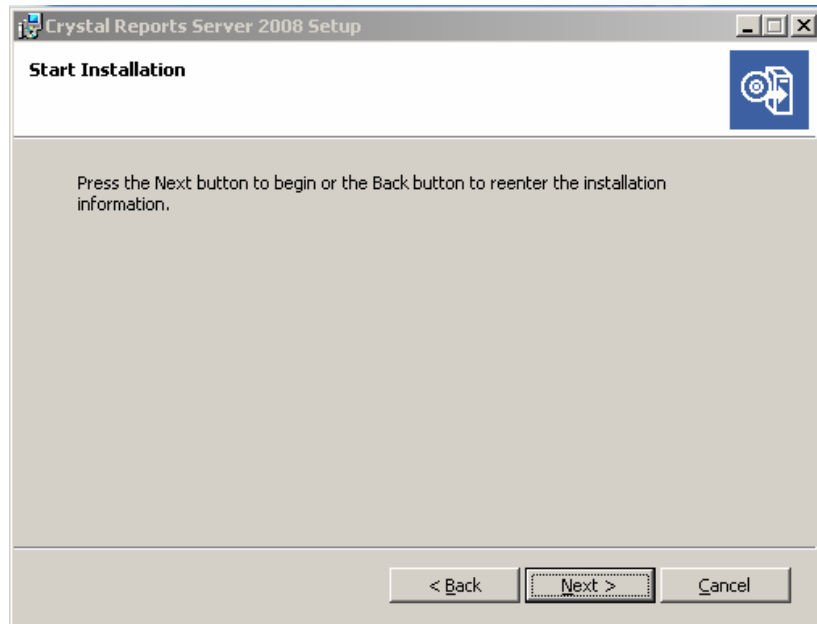
2. Click **Next** to continue with the installation setup.

The “Start Installation” screen is displayed.

Remember your credentials for the web application server as they may be required to install additional language packs.

To start the installation

The “Start Installation” screen is the final screen in the installation setup.



To uninstall the previous version of Crystal Reports Server

After Crystal Reports Server 2008 is installed in a simple upgrade, a dialog box appears that asks you if you want to uninstall your XI or XI Release 2 deployment.

Note: It is highly recommended that you uninstall the previous XI or XI Release 2 system as soon as you have verified that Crystal Reports Server 2008 has successfully installed. If you choose to uninstall Crystal Reports Server 2008 later, you must ensure that the previous version of servers are not re-enabled and not re-started. In particular, enabling the older version of the CMS and File Repository Server will conflict with the Crystal Reports Server 2008 system.

1. If you want to uninstall your previous version of Crystal Reports Server click **Yes**, and when the Windows installer dialog box appears, click **Yes** again.
2. If you do not want to uninstall your previous version of Crystal Reports Server, click **Exit** to complete the installation process.

The installer disables the previous version of Crystal Reports Server. You can uninstall the previous version at a later time through Add/Remove Programs.

Performing a Complex Upgrade

In a complex upgrade, you install a new deployment of Crystal Reports Server 2008, either on the same computer as your Crystal Reports Server XI or XI R2 deployment or on another computer, and then copy the business intelligence content from your existing deployment.

When you are copying content to your Crystal Reports Server 2008 deployment, users will still be able to access the existing XI or XI Release 2 deployment. However, any new content that is added to the existing deployment after the process of copying data has started will not be copied to the new deployment. Therefore, it is recommended that you prevent users from accessing your existing XI or XI Release 2 deployment once the process of copying your data has started.

After Crystal Reports Server 2008 is installed, both deployments can be run at the same time. You can uninstall your XI or XI Release 2 deployment when you are ready to do so.

After you install Crystal Reports Server 2008, you must perform the following steps:

1. Copy the content from your XI or XI Release 2 deployment to your Crystal Reports Server 2008 deployment, either through the Central Configuration Manager or through the Import Wizard.
2. Manually add and configure any necessary servers.
3. Enable your Crystal Reports Server 2008 services.
4. Add the Search Indexing Program
5. Update any events that you copied to the Crystal Reports Server 2008 deployment from your existing Crystal Reports Server deployment.

Note: The default CMS port number is 6400. If you are installing Crystal Reports Server 2008 on the same machine that has an XI or XI Release 2 deployment, and you want to import content from the existing deployment to the Crystal Reports Server 2008 deployment, you must first select a different port number than the port the existing deployment uses.

Copying data to your Crystal Reports Server 2008 deployment

When you perform a complex upgrade to Crystal Reports Server 2008, the installer will skip the step “Existing CMS Database Information for Upgrade”. (See “To select a simple upgrade” on page 6.) If you are

performing a complex upgrade to Crystal Reports Server 2008, you must install the new system and then copy your business intelligence content from your existing XI or XI Release 2 CMS database to your Crystal Reports Server 2008 CMS database. You can copy your content either through the Central Configuration Manager (CCM) or by using the Import Wizard.

Copying the CMS data through the CCM copies all the objects of the CMS at once, so it is the simplest and quickest solution if you want to copy your entire CMS database contents.

The Import Wizard gives you the ability to select and copy specific objects from a CMS, so it is the best option if you want to only import a subset of the source objects into the Crystal Reports Server 2008 system.

Note: When you use the CCM to copy the contents of a database, it re-initializes the destination database. This means that any data in the destination database is deleted. If you are copying data from a source database, and want to preserve any data that already exists in the destination database, you must use the Import Wizard.

If you are using the CCM to copy your content to your Crystal Reports Server 2008 deployment, you must perform the following steps:

- Use the CCM to copy the data from your existing CMS database to your Crystal Reports Server 2008 CMS database.
- Either re-point the new Input and Output File Repositories to the locations of the existing repositories, or copy the files in the existing file repositories to the Crystal Reports Server 2008 file repositories.
- Use the CCM to update the objects in your CMS repository. This step adds the properties to the objects copied from the CMS that Crystal Reports Server 2008 requires.

Note: If you've performed a simple upgrade, the installer automatically copies your content to your Crystal Reports Server 2008 deployment.

Copying data from your existing CMS system database

If you install a new Crystal Reports Server 2008 system alongside your original installation, whether on the same machine or on another machine, you can use the Central Configuration Manager (CCM) to copy system data from the existing XI or XI Release 2 CMS database into your Crystal Reports Server 2008 CMS database.

The destination database is initialized before the new data is copied in, so any existing contents of the destination database are permanently deleted (all Crystal Reports Server tables are destroyed permanently and then recreated). Once the data has been copied, the destination database is established as the current database for the CMS.

Tip: If you want to import users, groups, folders, and reports from one system database to another, without deleting the contents of the current CMS database, use the Import Wizard. For more information, click Help in the Import Wizard.

Note:

- If you performed a simple upgrade, the installer performs this step automatically.
- If you are using the Import Wizard to import content from your existing deployment, it is not necessary to perform these steps.

To copy a CMS system database on Windows

Before you copy the contents of the CMS database, ensure that you can logon to the destination database with an account that has permissions to add or drop tables, and to add, drop, or modify data in those tables.

Note: If you are copying a CMS database from a Crystal Reports Server 2008 source destination to a Crystal Reports Server 2008 target destination, you can change the CMS location, name, and database type. However, you cannot change the Crystal Reports Server installation path, operating system, and machine name.

1. Open the Central Configuration Manager (CCM) and stop the Server Intelligence Agent (SIA).
2. Right-click the SIA and choose **Properties**.
3. Click the **Configuration** tab, and then click **Specify**.
4. Choose **Copy**, then click **OK**.
5. Choose the version information for the source CMS database.
6. Select the database type for the source CMS database, and then specify its database information (including host name, user name, and password).
7. Select the database type for the destination CMS database, and then specify its database information (including host name, user names and password).
8. When the CMS database has finished copying, click **OK**.
9. If you are upgrading from an earlier version than Crystal Reports Server 2008, you will be prompted to build a Server Intelligence Agent.
 - a. Click **OK**.
 - b. Specify the administrator password, and then click **OK**.

c. When the SIA is built, click **OK**.

10. Proceed to *Copying file repository server data*.

To copy a CMS installed on Linux

Use this procedure if your Central Management Server (CMS) is installed on Linux and you are copying data from Crystal Reports Server XI or XI Release 2. Before you copy the contents of the CMS database, ensure that you can logon to the destination database with an account that has permissions to add or drop tables, and to add, drop, or modify data in those tables.

Note: On Linux you cannot migrate directly from a source environment that uses an ODBC connection to the CMS database. If your source CMS database uses ODBC, you must first upgrade that system to a supported native driver.

1. Stop the Crystal Reports Server 2008 CMS by typing the following command:

```
./ccm.sh -stop sia
```

2. Run `cmsdbsetup.sh` (located in `<InstallDirectory>/bobje/`, by default).

3. Select the “copy” option (option 4), then confirm your choice.

4. Select the version information for the source CMS database.

5. Select the database type for the source CMS database, then specify its database information (including host name, user name, and password).

6. Select the database type for the destination CMS database, and then specify its database information (including host name, user name, and password).

The CMS database is copied to the destination machine. A message appears when the copy is complete.

7. If you are upgrading from an earlier version than Crystal Reports Server 2008, you will be prompted to build a Server Intelligence Agent. Specify the administrator password.

A message appears when the SIA is built.

8. Proceed to *Copying file repository server data*.

Copying file repository server data

When you install Crystal Reports Server 2008, new Input and Output File Repositories are created. For your Crystal Reports Server 2008 deployment to be able to access the content in your existing file

repositories, you need to either re-point the Crystal Reports Server 2008 file repositories to the XI or XI Release 2 repositories, or copy the contents of the XI or XI Release 2 repository folders to the Crystal Reports Server 2008 repository folders.

Note:

- If you performed a simple upgrade, the installer performs this step automatically.
- If you are using the Import Wizard to import content from your existing deployment, it is not necessary to perform these steps.

To re-point the file repository servers

1. Log onto the CMC at:
http://<machineName>:<portNumber>/CmcApp using the Administrator account and password that you specified during the install.
2. Browse to the “Servers” page, select the Input File Repository Server, and click **Manage > Properties**.
3. In the **File Store Directory** field, type the path to the location of the existing Input File Repository directory, and click **Save & Close**.
4. On the “Servers” page, select the Output File Repository Server, click **Manage > Properties**, and specify the path to the location of the existing Output File Repository.
5. Proceed to *Updating the CMS Repository Objects*

To copy file repository server data

1. Log on to the CMC of the Crystal Reports Server 2008 deployment at:
http://<machineName>:<portNumber>/CmcApp using the Administrator account and password that you specified during the install.
2. Browse to the “Servers” page, and stop the Crystal Reports Server 2008 Input and Output File Repository Servers.
3. Delete the contents of the following folders:
 - <INSTALLDIR XI 3.0>:/BusinessObjects Enterprise 12.0/FileStore/Input
 - <INSTALLDIR XI 3.0>:/BusinessObjects Enterprise 12.0/FileStore/Output
4. Copy the contents of the XI or XI Release 2 Input and Output folders to the Crystal Reports Server 2008 Input and Output folders.

5. Proceed to *Updating the CMS Repository Objects*

Updating the CMS Repository Objects

After you complete copying the contents of your existing database to your Crystal Reports Server 2008 database, you must update the CMS repository objects. This step adds the properties to the objects copied from the CMS that Crystal Reports Server 2008 requires.

Note:

- If you performed a simple upgrade, the installer performs this step automatically.
- If you are using the Import Wizard to import content from your existing deployment, it is not necessary to perform these steps.

To update CMS repository objects on Windows

1. Open the Crystal Reports Server 2008 Central Configuration Manager (CCM) and start the Server Intelligence Agent.
2. Open an internet browser, and log on to the Central Management Console at `http://<machinename>:<portNumber>/CmcApp`, using the Administrator account and password.
3. Browse to the "Servers" page, and start the Input and Output File Repository Servers.
4. In the Central Configuration Manager, click **Update Objects**. The "Log On" dialog box appears.
5. Enter the information for the CMS repository. The CCM retrieves a list of objects that require updating.
6. When the CCM is ready, click **Update**. A status bar is displayed that shows the progress of the update.
7. When the update is complete, click **OK**.

To update CMS repository objects on Linux

1. Start the Crystal Reports Server 2008 Server Intelligence Agent.
2. Open an internet browser, and logon to the Central Management Console at `http://<machinename>:<portNumber>/CmcApp`, using the Administrator account and password that you specified during the install.
3. Browse to the "Servers" page and start the Input and Output File Repository Servers
4. In a Linux terminal, run the following command:

```
<INSTALLDIR XI 3.0>/ccm.sh -updateobjects -cms<CMS name> -  
username <administrator user name> -password <administrator  
password>
```

Using the Import Wizard

The Import Wizard is a locally installed Windows application that allows you to import existing user accounts, groups, folders, and reports, and other business intelligence content to your new Crystal Reports Server 2008 system.

The Import Wizard runs only on Windows, but you can use it to import information from a source environment that is running on Windows or Linux to a new Crystal Reports Server 2008 system that is running on Windows or on Linux.

If your Crystal Reports Server 2008 server runs on Linux, you need to install the Import Wizard on a separate Windows machine.

For more information on importing content into Crystal Reports Server 2008, see the *BusinessObjects Enterprise XI 3.0 Import Wizard Guide*.

Enabling Crystal Reports Server 2008 Services

After you've copied the content from your previous version of Crystal Reports Server, enable the Crystal Reports Server 2008 Services through the Central Configuration Manager (CCM).

1. Open the CCM, and start the Server Intelligence Agent and web application server.
2. Open a browser, and log in to the Central Management Console, using an administrator username and password.
3. Browse to the "Servers" page, select all the servers, and click **Enable**.

Adding the Search Index Program

For the Central Management Server's Content Search to return results, you must index the CMS by adding the Search Index Program. The Search Index Program indexes the documents in the CMS repository in order to make them searchable.

For more information on the Search Index Program, see the "Content Search" chapter of the *BusinessObjects Enterprise Server Administration Guide*.

Note: If you are performing a simple upgrade to Crystal Reports Server 2008, the installer performs this step automatically.

1. Log in to the Central Management Console, with an administrator username and password.
2. Go to **Public Folders > Search Program**, and delete the Search Indexing Program.
3. Use the Import Wizard to import the Crystal Reports Server 2008 Search Indexing Program.

Uninstalling the previous version of Crystal Reports Server 2008

If you installed Crystal Reports Server 2008 in a side-by-side deployment with a previous version of Crystal Reports Server, the previous version will still be running. When you are ready, you can uninstall the previous version through Add/Remove Programs.

Note: The following features will not be uninstalled:

- The contents of your XI or X Release 2 Repository Servers
- CMS database tables

To uninstall Crystal Reports Server 2008

1. From the Windows Control Panel, start Add/Remove Programs
2. Select any BusinessObjects program, Service Packs and Critical Hot fixes and click **Remove**.

Finding More Information

For additional information about the topics covered in this document, please refer to the Crystal Reports Server 2008 Installation Guide posted at: <http://help.sap.com/>.