

BusinessObjects Enterprise XI 3.1 Import Wizard Guide

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Contents

Chapter 1	Getting Started	7
Chapter 2	Import Wizard concepts	11
	Importing objects.....	12
	Security migration overview.....	13
	Delegated administration.....	14
	Life cycle management.....	15
Chapter 3	Importing information From Crystal Enterprise or BusinessObjects Enterprise	17
	What kinds of objects can be imported?.....	18
	Importing users and groups.....	19
	Importing folders.....	20
	Importing report objects.....	21
	Importing rights.....	22
	Importing events, servers, and server groups.....	22
Chapter 4	Importing Information From BusinessObjects 5.x or 6.x	25
	Before importing from BusinessObjects Enterprise 5.x/6.x.....	26
	Ensure that you have appropriate rights.....	26
	To map the Import Wizard to Inbox and personal files.....	26
	Export locally stored objects.....	27
	Back up your source repository.....	27
	Importing objects from BusinessObjects Enterprise 5.x/6.x.....	27
	What kinds of objects can be imported?.....	27
	Security migration options.....	28

Contents

BusinessObjects documents.....	30
Folders, domains, and categories.....	32
Connections.....	33
Universes and universe connections.....	35
Application Foundation objects.....	37
Third-party documents.....	37
Chapter 5 Using the Import Wizard	39
Specifying the source environment.....	40
To specify BusinessObjects 5 or 6 as a source environment.....	41
To specify an Application Foundation source.....	42
To specify Crystal Enterprise 9 as a source environment.....	42
To specify Crystal Enterprise 10 as a source environment.....	43
To specify BusinessObjects Enterprise XI or XI Release 2 as a source environment.....	43
To specify a BusinessObjects Enterprise XI 3.x source environment.....	44
To specify a Business Intelligence Archive Resource file as a source environment.....	44
To specify a Text file as a source environment.....	45
Specifying the destination environment.....	45
To set the destination environment.....	47
Selecting objects to import.....	47
Selecting an import scenario.....	48
To select an import scenario when importing from BusinessObjects or XI 3.x.....	49
To select an import scenario when importing from other versions.....	53
Selecting incremental import options.....	56
Selecting security migration options	58
Selecting specific objects to import.....	59
To select users and groups.....	59
To select group import options.....	60

Contents

	To populate database credentials for users.....	60
	To select access levels.....	61
	To select categories.....	61
	To select folders and objects.....	62
	To select application folders and objects.....	62
	To select import options for universes and connections.....	62
	To select universe folders and universes.....	64
	To select import repository objects options.....	65
	To select import options for publications.....	65
	To select remote connections and replication jobs.....	66
	To select personal documents and inbox documents.....	66
	To select Broadcast Agent Publisher External Users and Groups.....	66
	To select Broadcast Agent Publisher Publications.....	67
	To select Broadcast Agent Publisher Profiles.....	67
	To select domains and documents.....	67
	To select locales and platform options	68
	Finalizing the Import.....	69
	Free disk space warning.....	69
	Preparing for import.....	69
	Completing the import.....	69
	Updating imported events.....	71
Chapter 6	Using text files with the Import Wizard	73
	Text file format.....	74
	Importing users, groups and profiles.....	74
	Example Group record.....	76
	Importing data source credentials.....	77
Chapter 7	Backing up and restoring server configuration settings	79
	To back up server configuration settings to a BIAR file.....	81

Contents

To restore server configuration settings.....	81	
Restoring server configuration scenarios.....	83	
To import nodes from one cluster to another	93	
Chapter 8	Life Cycle Management	95
Promoting report objects.....	98	
To promote report objects with existing universes.....	100	
To promote report objects with new business views.....	101	
To promote report objects with existing business views.....	102	
Promoting universes and universe connections	103	
To promote universes and universe connections.....	103	
Promoting users, groups, and object rights.....	104	
To promote new users and existing groups.....	105	
To promote new groups with existing users.....	106	
To promote new object rights for existing users and groups.....	107	
Appendix A	Get More Help	109
Index		113



Getting Started

1



chapter

The Import Wizard provides a series of screens that guide you through the process of importing and exporting Business Intelligence content such as user accounts, groups, folders, reports, universes, security, servers, and other objects. Various dialog boxes may appear depending on the source environment and the types of information that you choose to import.

You can use the Import Wizard to import content from BusinessObjects, Crystal Enterprise, or BusinessObjects Enterprise into your current BusinessObjects Enterprise deployment. You can also export content from a BusinessObjects Enterprise XI 3.x deployment to a Business Intelligence Archive Resource (BIAR) file, or import content from a BIAR file to your BusinessObjects Enterprise XI 3.x deployment.

You can choose to merge the contents of the source repository into the destination repository, or you can update the destination with the contents of the source CMS. You may also choose to import from or export to BIAR (Business Intelligence Archive Resource) files.

You can also use the Import Wizard to back up XI 3.x server configuration settings to a BIAR file, and restore server settings from an XI 3.x BIAR file to an XI 3.x deployment.

Note:

Business Objects does not support moving Business Intelligence (BI) content from a recent version of BusinessObjects Enterprise to an earlier version of the same release using BIAR files, the Import Wizard, or any other Business Objects Life Cycle Management (LCM) Tool. For example, reports, documents, and any other content from a BusinessObjects Enterprise XI Release 2 SP3 system cannot be moved to a BusinessObjects Enterprise XI Release 2 SP2 environment.

Before starting this procedure, ensure that you have the Administrator account credentials for both the source and the destination environments. You can use a Delegated Administrator account for an XI 3.x source or destination environment.

The overall process is divided into the following general procedures:

1. Specifying the source environment.
2. Specifying the destination environment.
3. Selecting the types of objects to import.
4. Selecting an Import Scenario, which determines whether to merge or update the objects that you import.

5. Selecting the specific objects to import.



Import Wizard concepts



2

chapter



Importing objects

When importing objects from a BusinessObjects 5.x, 6.x, Crystal Enterprise 10, or Business Objects XI, XI Release 2, or XI 3.x source environment, you can specify what you want the Import Wizard to do when it finds objects on the source and destination environments with the same name and path or the same CUID.

Note:

When you are importing objects from Crystal Enterprise 9, the Import Wizard uses the objects' CUID to identify matching object. It automatically renames any source object that already exists on the destination environment, by appending a number to the end of the name.

Importing objects from BusinessObjects 5.x, 6.x, or XI 3.x

When you are importing from a BusinessObjects 5.x or 6.x environment, or from an XI 3.x source environment, you can choose to match objects by name and path or by CUID. When you choose to match objects by CUID, and the Import Wizard finds a matching object, you choose one of the following:

- Update the destination object, and in case of a name conflict, rename the object.
- Update the destination object, and in case of a name conflict, do not import the object.
- Do not import the object.

When you choose to match objects by name and path, and the Import Wizard finds a matching object, you can choose one of the following:

- Keep the destination object and import a renamed copy of the object.
- Update the destination object.
- Do not import the object.

Importing objects from other versions

When you are importing objects from Crystal Enterprise 10, Business Objects XI, or XI Release 2, you can merge the source system with the destination system, or update the destination system.

When you merge the environments, the Import Wizard uses the name and path of the source objects to determine whether those objects already exist on the environment. The Wizard adds all of the selected objects from the source to the destination CMS without overwriting objects in the destination environment. All of the objects in the destination environment are preserved.

When you update the destination environment, objects in the source are added to the destination CMS. If a source object has the same unique identifier as an object in the destination environment, the destination object is overwritten. If you do not want the Import Wizard to overwrite objects on the destination on the "Incremental import" screen, you can choose to not overwrite existing objects, rights, groups, and group memberships. In this case, the objects that already exist on the destination are not overwritten by the selected source objects.

If you are updating the destination environment and the Import Wizard finds an object on the destination with the same name and path as an object that you are importing but a different CUID, you have the option to **Automatically rename objects if an object with the same title already exists in the destination folder**. If you choose this option, the Import Wizard renames the source object and imports it. If you don't choose this option, the Wizard does not import the source object.

Incremental import options

If you are updating objects that already exist on the destination environment, you can choose appropriate incremental import options. These provide you with options to overwrite or not overwrite objects, universes, universe connections, user and group membership, and object rights. For example, even though you choose to update and overwrite report objects, you can decide to not overwrite the universes and universe connections that your reports use.

Related Topics

- [Selecting an import scenario](#) on page 48
- [Selecting incremental import options](#) on page 56

Security migration overview

When you use the Import Wizard, you can import content with or without security rights. Which of these you choose will depend on several factors. If you have a large or complex system you should consider migrating content

without security, and then rebuilding security later using the higher degree of control available in the new environment.

You can import objects without security by importing them without any users or groups.

If you are importing content from a BusinessObjects 5.x or 6.x system, and you want to import both objects and users/groups, you can still import the objects without their rights. To do this, on the "Security Migration Options" screen, select **No, don't migrate security**.

If you are importing content from a Crystal Enterprise or BusinessObjects Enterprise system, and you are importing users or groups, any rights that do not already exist on the XI 3.x system will be imported. The "Import Scenarios" and "Incremental Import" screens provide you with options to overwrite rights that already exist on the destination, or to leave those rights untouched.

The import process allows you to choose whether to migrate rights exactly as they are or to allow additional rights to be added after importing.

Delegated administration

You can use delegated administration to divide administrative tasks between functional groups within your organization. For example, you may want people from different departments to manage their own users and groups.

When you use the Import Wizard, you can log into a source and destination environment for the import with an administrative account. You can also let delegated administrators that have less than full administrative access to log into XI 3.x source and destination environments and import only those users and objects that they have access to.

If delegated administrators are importing objects from an XI 3.x system, they require the View and Copy right on those objects. To import users, they require the Modify User Password right.

If delegated administrators are importing objects that don't already exist on the destination, they require the View, Copy, and Add rights on the folder or area on the destination that the objects belong to. For example, if a delegated administrator is importing Report A into Folder A on the destination, the administrator requires View, Copy, and Add rights on Folder A.

If delegated administrators are importing objects that already exist on the destination, they require the View, Edit, Copy, and Modify Rights rights on the objects. For example, if a delegated administrator is importing Report A , and that report already exists on the destination, the administrator requires the View , Edit, Copy, and Modify Rights rights on Report A on the destination.

If delegated administrators are importing users, they require the Modify User Password for those users, whether the users already exist on the destination or not.

For more information on delegated administration, refer to the *BusinessObjects Enterprise Administrator's Guide*.

Life cycle management

In addition to importing objects from previous versions to XI 3.x, the Import Wizard also enables you to manage the life cycle of a deployment by moving assets from one XI 3.x deployment to another XI 3.x deployment. This allows you to modify and enhance reports and other objects on, for example, a Development or Test environment, and then promote those objects to a Production environment.

The “Life Cycle Management Scenarios” chapter of this guide presents scenarios that demonstrate how the Import Wizard can be used to promote new and existing objects to a Production environment.

Related Topics

- [Life Cycle Management](#) on page 95



Importing information From
Crystal Enterprise or
BusinessObjects Enterprise

3

chapter

The following sections describe importing objects from a Crystal Enterprise or BusinessObjects Enterprise system to a BusinessObjects Enterprise XI 3.x system.

What kinds of objects can be imported?

The following types of objects can be imported from a Crystal Enterprise or BusinessObjects Enterprise XI, XI Release 2, and XI 3.x source environment:

- Users and user groups
- Folders and objects
- Discussions
- Universes and connections
- Inbox, personal, and corporate documents
- Third-party ("agnostic") documents (such as .pdf, .ppt, .doc, .xls, .txt, .rtf)
- Personal and corporate categories
- Calendars
- Events
- Server Groups
- Servers

The following object types can be imported from a BusinessObjects Enterprise XI 3.x source environment.

- Server intelligence objects
- Access levels
- Remote connections
- Replication jobs

Note:

- If you are importing unmanaged objects from Crystal Enterprise 9, you must first upgrade the objects to an intermediate version and then import the objects into XI 3.x.

You can use the Import Wizard to import managed objects from Crystal Enterprise 9.

- The Import Wizard does not import Olapi reports (.car files) from Crystal Enterprise 10.

Importing users and groups

The Import Wizard imports users and groups and their hierarchical relationships. If you import a group that already exists on the destination environment, you can choose to merge the groups that exist on both the source and destination environments, or overwrite the destination group's membership with the source group's membership.

If you merge source and destination groups, the Import Wizard updates the destination's membership by adding the users who were members of the group in the source environment. These additional users are added to BusinessObjects Enterprise if their accounts do not exist already.

When you overwrite the destination's group membership with the source's group membership, the Import Wizard replaces the destination group with the source group. This means that if the destination group before the import has members that don't exist on the source group, those members are lost during the import.

To merge source and destination user groups, on the "Incremental import" screen, ensure that you clear the **Overwrite group and user membership** checkbox. To replace destination groups with source groups, ensure that you select **Overwrite group and user membership**.

User licensing can affect the behavior of the Import Wizard. If the source environment uses Concurrent licensing, the wizard imports all users as Concurrent Users. However, if the source environment uses Named User licensing, the wizard first checks the number of Named User license keys in the destination environment. If there are enough Named User licenses in the destination environment, the wizard imports all users as Named Users. If there are not enough Named User licenses in the destination environment, the wizard imports all users as Concurrent Users. For more information about licensing, see the *BusinessObjects Enterprise Administrator's Guide*.

Note:

BusinessObjects Enterprise XI does not include a New Sign-Up feature. However, if your Crystal Enterprise source environment includes users that

belong to the New Sign-Up group, the group is migrated to the destination BusinessObjects Enterprise XI environment.

Aliases

If a user in the destination system has an alias that is identical to a user who is being imported, the destination user keeps all aliases, and the imported user loses that particular alias.

Windows AD

When importing users that employ Windows Active Directory authentication, ensure that the administrative credentials are the same on both the source and destination systems. Active Directory authentication must also be enabled on the destination system.

LDAP

When importing users that employ LDAP authentication, the Host list and Base LDAP name need to be the same on both the source and destination systems. LDAP authentication must also be enabled on the destination system.

Related Topics

- [Importing objects](#) on page 12
- [Selecting an import scenario](#) on page 48
- [Selecting incremental import options](#) on page 56

Importing folders

Folders are imported, whether or not they exist already in the destination environment. To ensure that existing folders are not overwritten, make sure you choose to rename the folders on the "Import scenarios" screen

If you are importing from Crystal Enterprise 10, or BusinessObjects Enterprise XI or XI Release 2, and are matching objects by name and path, you can choose the **Automatically rename top-level folders that match top-level folders on the destination system** option on the "Import scenario" screen to rename the source folders when you import them. If you don't select this option, and the Import Wizard finds folders on the destination with the same name and path, the Import Wizard doesn't import the source folders.

If you are matching objects by CUID, you can choose **Automatically rename objects if an object with that title already exists in the destination folder**. If you do not choose this option, the Import Wizard does not import the folder.

If you are importing from BusinessObjects Enterprise XI 3.x, are matching by name and path, and do not want to overwrite existing folders, on the "Import scenarios" screen select either **Keep the destination object and import a renamed copy of the object** or **Do not import the object**.

If you choose to rename folders, the Import Wizard appends a number to the end of any duplicated folder names to indicate the number of copies. For example, if you import a folder called Sales Reports when a folder called Sales Reports already exists, then the imported folder is added to BusinessObjects Enterprise with the name Sales Reports(2).

Related Topics

- [Importing objects](#) on page 12
- [Selecting an import scenario](#) on page 48

Importing report objects

The Import Wizard can import report objects, the report instances for each report object, and the scheduling patterns that you have set up in the source environment.

Supported reports are imported with their parent folders. If you do not want to overwrite existing folders on the destination, on the "Import scenarios" screen, ensure that you either choose to rename the folders from the source, or choose to not import folders. If you choose to rename the source folders, the Import Wizard appends a number to the end of any duplicated folder names to indicate the number of copies.

When you import content from one deployment to another, you can ensure that a particular user account retains ownership of its objects and scheduled instances by importing the user along with the content. If you don't import the user account, the ownership properties of its objects and instances are reset to your current administrative account.

In the SDK, ownership is reflected by an object's `SI_OWNERID` property and by a scheduled instances's `SI_SUBMITTERID` properties.

Related Topics

- [Importing objects](#) on page 12
- [Selecting an import scenario](#) on page 48

Importing rights

When you import folders and reports from one BusinessObjects Enterprise system to another, the associated object rights are imported for every user or group who is imported at the same time. If the user or group is not imported at the same time, or if the user or group does not already exist on the destination environment, the object rights are discarded.

If you do import the appropriate user or group, and the user or group already exists by name in the destination environment, then the corresponding object rights are imported and applied to the existing user or group.

If you are importing from a Crystal Enterprise 10 or BusinessObjects Enterprise XI, XI Release 2, or XI 3.x source environment, you have the additional option of not overwriting existing object rights on the destination environment. To do this, on the "Incremental import" screen, ensure that you clear the **Overwrite object rights** checkbox.

Related Topics

- [Importing objects](#) on page 12
- [Selecting an import scenario](#) on page 48
- [Selecting incremental import options](#) on page 56

Importing events, servers, and server groups

When you use the Import Wizard to import information from a Crystal Enterprise 9 or later system, you have the additional option to import events, servers, and server groups from the source environment.

The Import Wizard lets you import servers and server groups. If you choose to import a server group without importing the servers in the group, the Import Wizard does not import the servers. You can also manually add servers to the imported group in the Central Management Console (CMC).

For more information see the *BusinessObjects Enterprise Administrator's Guide*.

Note:

- When importing report objects associated with a server group, if the server group exists on the destination system, the report objects are added to the existing group and the source system's server group is not imported.
- If you have jobs scheduled or pending on a server or server group that you are importing, you might notice odd behavior on the destination system with the individual jobs involved until they run or time out.

Objects that have server group restrictions lose the restrictions if the objects are imported and the server group is not. For example, if a report is scheduled to run only under server group A and that server group is not imported, the report loses that restriction and will run under any server group. You need to import the server group at the same time as the objects that use it to keep the relationship between them.

The same logic applies for events: if an object is set up to wait for an event or to trigger an event, you need to import the event at the same time as the object. Otherwise, the object is imported without the dependency and no longer waits for, or triggers, the event.

Note:

- If Event A is being imported from the source system but there is already an Event A on the destination system, and it is a different type (for example, a File event instead of a Custom event), the wizard removes the dependency on Event A from the object when it is imported.
- Events are based on Event Servers. Because servers are not imported from previous versions of BusinessObjects Enterprise, if you are importing events, you must run an `EventUpdater` script to associate the events with new event servers after you complete the import process. For more information, see [Updating imported events](#) on page 71.

After you use the Import Wizard to import events to a destination environment, you must run the `EventUpdater` script to associate the imported events with the destination Central Management Server (CMS).

Related Topics

- [Backing up and restoring server configuration settings](#) on page 79
- [Updating imported events](#) on page 71

3 | Importing information From Crystal Enterprise or BusinessObjects Enterprise *Importing events, servers, and server groups*



Importing Information From BusinessObjects 5.x or 6.x



4

chapter

The following sections describe importing objects from a BusinessObjects 5.x or 6.x system to a BusinessObjects Enterprise XI 3.x system. For more information, see the *BusinessObjects 5/6 to XI 3.1 Migration Guide*.

Before importing from BusinessObjects Enterprise 5.x/6.x

Ensure that you have appropriate rights

Make sure you have the following rights:

- In version 6.x, you must have a General Supervisor profile.
- In XI 3.1, you must belong to the Administrator group in the CMS.
- To import any resource into the CMS, you must have the rights needed to add objects to the destination folder to which the resource is assigned.

To map the Import Wizard to Inbox and personal files

On the Import Wizard machine, map the drives to the source environment directories containing the deployment's .key files, personal documents, categories, and users' Inboxes:

- \$INSTALLDIR\locData for access to 5.1.x .key files
- \$WISTORAGEDIR\user if you are importing personal documents and categories
- \$WISTORAGEDIR\mail if you are importing the read content of users' Inbox folders
- \$INSTALLDIR\nodes\- \$INSTALLDIR\nodes\

- \$INSTALLDIR\nodes\

Export locally stored objects

Objects that you are planning to import to the destination environment using the Import Wizard must reside in the version 6.x repository.

If objects are stored locally on users' computers, you must make sure the users export the objects to the repository before you begin the import.

Tip:

Create a specific category to store local content.

Back up your source repository

Business Objects strongly recommends backing up your 6.x source repository before beginning the migration.

In addition, it is good practice to run the Import Wizard on a copy of the source repository, and not on the production version. If you follow this practice, make sure that you point all the domains to the copied repository, so that the domains are no longer associated with the original (production) repository.

Importing objects from BusinessObjects Enterprise 5.x/6.x

What kinds of objects can be imported?

The following types of objects can be imported from BusinessObjects 5.x and 6.x using the Import Wizard:

- Users and user groups
- Universes and connections

- Stored procedures
- Inbox, personal, and corporate documents
- Third-party ("agnostic") documents (such as .pdf, .ppt, .doc, .xls, .txt, .rtf)
- Personal and corporate categories
- Broadcast Agent Scheduler tasks that are supported in XI 3.x
- Application Foundation 6.x objects
- Third-party documents used by Application Foundation objects (includes .svg, .xml, .swf, .csv, .gif, .jpg, .bmp, and .png)
- Broadcast Agent Publisher publications, profiles and external users

Potential limitations

In the current version, the Import Wizard does not import:

- Business Objects Services Administrator settings
- Administration Console settings
- Web Intelligence OLAP
- Custom applications and interfaces created using the SDK
- Broadcast Agent Scheduler tasks that are not supported in XI 3.1
- BusinessObjects Auditor
- InfoView personal settings
- some user settings, such as timestamps
- BusinessQuery

Security migration options

Security in XI 3.1 contains greater complexity and finer-grained control compared to previous versions. Because of this, for large or complex deployments we recommend that you migrate your BI content without migrating its security, and then rebuild security in the new environment.

You can import objects without security simply by importing them without any users or groups.

If you want to import both objects and principals at one time, however, you can still import the objects without their rights by choosing the appropriate option in the Import Wizard's Security Migration Options dialog box.

When you select users/groups to be imported, rights may be imported as well:

- If you have selected objects as well, users' rights on these objects will be imported.
- Rights on applications, such as InfoView and Web Intelligence are always imported.

To give you more flexibility in how these rights are migrated, the Import Wizard provides three security migration options which allow you to import objects either with their rights or without them; if you import security, it also allows you to restrict user rights.

Object rights migration

The Import Wizard presents the following options for importing object rights:

- The first option imports the objects' content and rights, in order to reproduce the source security model. It also sets additional rights in the destination CMS pertaining to the imported objects:

Object	Value
Performance Management folder (top level) access level	No Access
All Desktop Intelligence rights	Not specified
All Web Intelligence rights	Not specified
All Designer rights	Not specified

As these rights are set for the Everyone group, they apply to all users, unless they are explicitly assigned another value. To give them access, administrators must use the CMC to explicitly grant the proper users the appropriate rights.

This is the most secure option, selected by default.

- The second option imports the objects' contents and rights, in order to reproduce the source security model, but does not set the restrictions in the target CMS that it sets in the first option.

Default settings are set in the Everyone group for some rights, and apply to all users. As these default values may be different from the version 6.x defaults, this may allow migrated users to have more rights than they had in the source environment.

If you want to avoid this, use the first option or do not migrate security and recreate it in the new environment.

In both cases, the Import Wizard sets the access level for the Everyone group to No Access for all imported domain folders. This restricts access for all users for whom no default rights are given.

After the import, you must use the CMC to explicitly give access to users and groups for specific folders. If you give access to a domain folder to the Everyone group, all users will have access to this folder and be able to see all documents in it.

Before doing this, make sure you have thoroughly reviewed the security using the CMC.

BusinessObjects documents

When you import a 5.x/6.x BusinessObjects (.rep) document to XI 3.1, the following occur:

- universe ID pointer is updated so that it references a universe in the CMS.
- an InfoObject is created in the CMS for this document and for the saving of this document
- properties are updated and displayed in the CMC

BusinessObjects template (.ret) documents do not contain cubes or a connection to a universe. Therefore, all that occurs is:

- the locale of the document is updated
- an InfoObject is created in the CMS

To convert migrated 5.x/6.x .rep documents to .wid format, you can use the Report Conversion Tool, delivered with the XI 3.1 suite. See the *Report Conversion Tool Guide* for more information.

If you migrate security during the import of BusinessObjects documents, version 5.x/6.x security commands are converted to XI 3.1 application-level and document-level rights. Some commands have been eliminated and others renamed.

The Administrators group in XI 3.1 has Full-Control access to documents. The Everyone group has View access.

Limitations

Keep in mind the following limitations when you import BusinessObjects documents:

- XI 3.1 can read BusinessObjects 5.x/6.x .rep documents, but after you save these documents in XI 3.1, they cannot be accessed by a 5.x/6.x version of the software.
- BusinessObjects 5.x/6.x cannot open XI 3.1 Desktop Intelligence documents.
- OLAP data providers are not supported in XI 3.1.

BusinessObjects 5.x/6.x documents based on an OLAP data provider are view-only in XI 3.1.

- There is no document password protection, on the server side, in XI 3.1.
- XI 3.1 Desktop Intelligence cannot access a version 5.x/6.x repository.

BusinessObjects SDK

The platform-related portion of the BusinessObjects SDK has evolved, which means that code developed for 5.1/6.x requires updates for platform interactions (authentication, send document, receive document).

Send to Users and Send to Broadcast Agent Server are not available in XI 3.1. Instead, you need to use the Platform COM SDK.

The server-side report engine is not multi-document. This means that add-ins is not loaded on the server. For example, for a document based on a custom data provider (DPVBAInterface) implemented in an add-in, refresh will fail.

Calculator changes

XI 3.1 uses a different report engine than BusinessObjects 5.x/6.x. Therefore, there are differences in the way the calculator is handled.

Because of this, there may be issues with BusinessObjects documents after they are imported to XI 3.1.

Folders, domains, and categories

In the 5x/6x repository, it is not possible to set keywords and descriptions for folders. In the XI 3.1 CMS, this is possible.

In XI 3.1 , in upgrade mode, when a domain is re-imported, if the user has set keywords and descriptions for the folder created from the domain, they are removed. Because they do not exist in 5.x/6.x, the update removes them in XI 3.1. If you re-import a domain from 5.x/6.x, the keywords and descriptions are kept.

You select the domains and documents you want to import into XI 3.1. When you select a document, the document's domain is also imported. Documents and universes cannot be imported without importing the domain.

Version 5.x/6.x document and universe domains are saved as sub-folders in the Public Folder of the CMS of XI 3.1. Objects corresponding to the universes and documents contained in the domains are imported to these folders.

If you have chosen to import security, access rights are preserved. User and group access to the folders are equivalent to the rights they had on the version 5.x/6.x domains.

XI 3.1 preserves the hierarchy of subcategories. Corporate (or administrative) categories are imported as categories under the Categories folder. For each

imported user, selected personal categories are imported to a new subfolder (named after the user) under the Personal Categories folder.

You can select individual Corporate categories and import Web Intelligence documents grouped by Corporate category. Personal categories, however, can be imported only as part of the batch import.

Connections

When you import version 5.x/6.x universes, the associated connections are imported automatically and are converted into connection objects.

Make sure that the Import Wizard can access the 5.x/6.x database the same way that version 5.x/6.x accesses it. You may need to install database drivers or configure connection settings on the machine.

For example, if you import SQL Server connection objects from a 5.x/6.x source environment, you must configure the connections on the destination machine via the Control Panel before you import the connection objects. You must use the same name and settings as the connection used on the source machine when you created the domain key.

BOUSER/BOPASS

In version 5.x/6.x, users could use `@Variable('BOUSER')` and `@Variable('BOPASS')` in the connection information for the universe. The variables were replaced at runtime with the user's enterprise username and password, and used to log on to the database.

For security reasons, however, XI 3.1 does not permit the retrieval of user passwords. Therefore, universe connections that previously used the BOUSER and BOPASS variables must now use database credentials (DBUSER and DBPASS). Those database credentials can be populated by the Import Wizard and later edited in the CMC, on the Properties tab for each user account.

When migrating, the Import Wizard:

- replaces BOUSER and BOPASS with DBUSER and DBPASS in universes
- proposes automatically populating these variables for users to migrate

You can, however, re-synchronize if users change their passwords.

Synchronizing enterprise and database credentials

There are three ways to synchronize enterprise and database credentials in the XI 3.1 system. You can:

- choose the Import Wizard option that batch imports user names and passwords from version 5.x/6.x to auto-populate database credentials in XI 3.1.
- run a batch upload of a user's file.

User names and passwords are loaded from a file, stored and used as database credentials.

- create a custom application using Enterprise SDK to set DBUSER and DBPASS information.

Access restrictions

In a 5.x/6.x system, access restrictions (object restrictions, table mapping, and row restrictions) are defined with the Supervisor application and associated with users and groups. A user who belongs to multiple groups is said to have multiple user instances (one instance per group).

Note:

Universe overloads in version 5.x/6.x are called access restrictions in XI 3.1. They are managed in Designer.

The Import Wizard enables you to import all access restrictions that are associated with the imported universes for any of the selected users and groups being imported. If no principal users or groups are selected for import, no access restrictions are imported and none are created.

The imported access restrictions are converted into objects. They remain connected to the universes to which they were connected in the source environment. The Import Wizard may create additional access restrictions in the destination environment in order to preserve the restrictions for all imported users.

Connections for access restrictions are not migrated automatically. You must manually migrate these connections.

Access restrictions are migrated using both object names and object IDs to identify universe components.

Access restriction aggregation

In both 5.x/6.x and XI 3.1 there are two types of access restrictions: exclusive and non-exclusive. Row restrictions are combined using the AND operator, while object restrictions and compatible table mappings are aggregated.

Exclusive access restrictions require a different mechanism. The Import Wizard deduces a global ordering of groups for each universe, based on the access restrictions prior to migration. For a given user, the Wizard considers the set of parent groups of that user and, in that set, the group with the highest priority determines which restriction set gets applied to that particular user.

Access restriction collapsing

Sometimes the global group ordering that is deduced during migration cannot account for all of the individual user priority settings in 5.x/6.x. In this case, access restrictions will be collapsed, meaning that the effective 5.x/6.x access restriction will be copied onto the user, which always has highest priority.

This means that there might be more access restrictions in the destination than in the source environment.

Universes and universe connections

The Import Wizard imports universes from a 5.x/6.x deployment into an XI 3.1 deployment. During this process, the relationship between universes, connections, and Desktop Intelligence/Web Intelligence documents is maintained.

IDs of the documents, universes, and connections are converted to cluster unique identifiers (CUIDs). The identifier distinguishes these objects from objects imported later from the source environment.

When you import a universe:

- the Import Wizard imports any associated connection objects

- the connection is saved in the FRS and an InfoObject is created in the CMS
- the universe and its linked documents are copied into the FRS
- universe overloads defined in 5.1/6.x, if migrated, are mapped to access restrictions in XI 3.1).
- ACEs are created to migrate universe-related security commands
- the locale is preserved

The Import Wizard has three modes for importing universes:

Mode	What it does
Import all universes and all connection objects	Imports all universes and all connection objects. You cannot select individual universes or connections.
Import all universes and only connection objects used by these universes	Imports all universes, and only connection objects used by those universes.
Import the universes and connections that the selected Web Intelligence and BusinessObjects documents use directly	Imports all universes and connections used by the selected documents. This option also enables you to select additional universes to import, even if they are not used by any document.

When you select a Web Intelligence or BusinessObjects document to import, the Import Wizard automatically selects the associated universes for import.

Note:

The Import Wizard also imports any universes with the same name that exist in other domains.

BusinessObjects documents may have been created outside the repository, using a "short name"; that is, a reference to a universe stored on a local machine. If the universe has a short name, its linked documents may not be imported if more than one universe is found in the CMS with the same short name.

Universe domains are converted into subfolders under the Universe folder. Each universe folder is named after the corresponding version 5.x/6.x

universe domain. When you import a universe from a domain, it is placed in the corresponding domain folder.

If the universe is a derived universe, then all relevant core universes and their connections are also imported.

Note:

Designer 5.x/6.x cannot open universes created with Designer XI 3.1.

Related Topics

- [Access restrictions](#) on page 34

Application Foundation objects

If you have Application Foundation 6.1.b or later, you can use the Import Wizard to import dashboards, analytics, and schedules into the CMS of XI 3.1.

Note:

Application Foundation is called Dashboards & Analytics in BusinessObjects XI 3.1.

The Performance Manager repository structure in XI 3.1 is similar to that of Application Foundation. There is no significant change in the architecture.

Third-party documents

BusinessObjects Enterprise 5.x/6.x supports third-party (also known as "agnostic") documents. The Import Wizard imports these documents into XI 3.1 if the format is supported. Formats supported in XI 3.1 include Adobe Acrobat PDF; Microsoft Power Point, Word, RTF, and Excel; and *.txt documents.

For the most up-to-date list of supported formats for third-party documents, see the list of supported platforms.

4 | Importing Information From BusinessObjects 5.x or 6.x

Importing objects from BusinessObjects Enterprise 5.x/6.x



Using the Import Wizard



5

chapter

The Import Wizard provides a series of screens that guide you through the process of importing and exporting Business Intelligence content such as user accounts, groups, folders, reports, universes, security, servers, and other objects. Various dialog boxes may appear depending on the source environment and the types of information that you choose to import.

The overall process is divided into the following general procedures:

1. Specifying the source environment.
2. Specifying the destination environment.
3. Selecting the types of objects to import.
4. Selecting an Import Scenario, which determines whether to merge or update the objects that you import.
5. Selecting the specific objects to import.

Note:

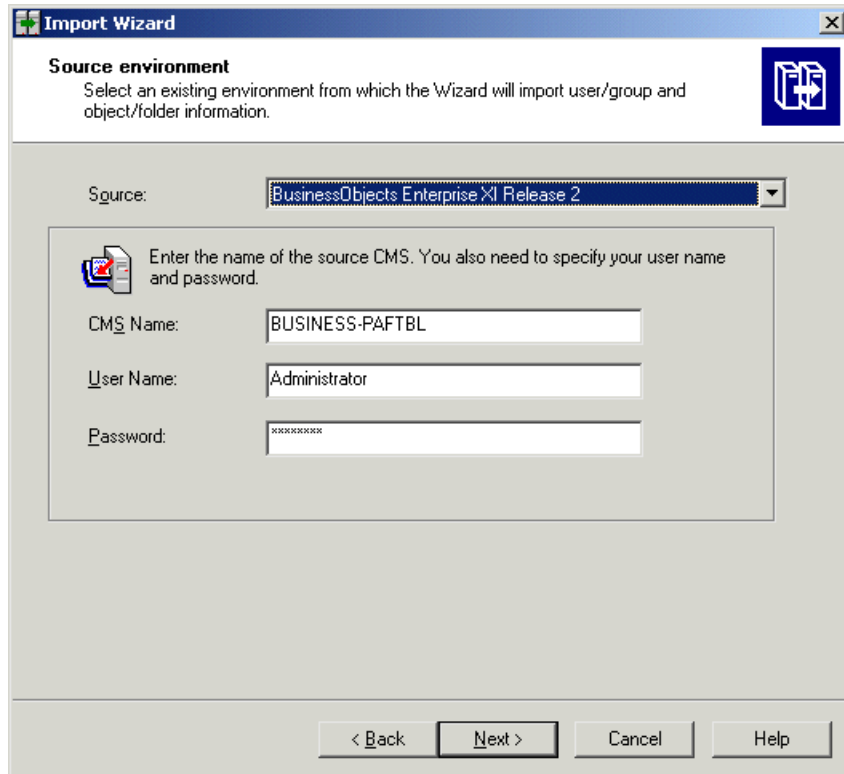
The process of importing users, groups and profiles from a text file is a less complex task. Both the format for the text file and the procedure are outlined in [Using text files with the Import Wizard](#) on page 73.

Related Topics

- [Specifying the source environment](#) on page 40
- [Specifying the destination environment](#) on page 45
- [Selecting objects to import](#) on page 47
- [Selecting an import scenario](#) on page 48

Specifying the source environment

The first step in importing content is to specify a source environment.



You can use any of the following as a source:

To specify BusinessObjects 5 or 6 as a source environment

1. Choose **BusinessObjects 5** or **BusinessObjects 6** from the **Source** list.
2. Type a User Name and Password that provide you with administrative rights to the source environment.
3. In the **Domain Key File** field, browse to .key file you created for the repository in your source environment.
4. If you selected 6.x as the source environment and you want to import Application Foundation objects using the Import Wizard, select the **Import Application Foundation Contents** check box.

You can import Application Foundation objects only if you selected BusinessObjects Enterprise 6.x (or XI) in the **Source** list.

5. Click **Next**.

A warning appears that summarizes the items that can be imported.

6. Click **Next**.

To specify an Application Foundation source

If you chose to import Application Foundation content from a BusinessObjects 6.x source environment, the "Specify Application Foundation source" screen appears.

1. To select dashboard files, browse to the location of the `conf` folder.
2. To specify an Application Foundation source repository:
 - Select **Use config file in the config folder to populate database fields**, or
 - Manually enter or select the information required for each of the following fields:
 - **Source database**
 - **Database Engine**
 - **Network layer or Server name**
 - **User name**
 - **Password**
3. Click **Next** to continue.

To specify Crystal Enterprise 9 as a source environment

1. Choose **Crystal Enterprise 9** from the **Source** list.
2. Enter the name of the source APS in the **APS Name** field.
3. Type a User Name and Password that provide you with administrative rights to the source environment.
4. Click **Next**.

The "Destination environment" screen appears.

Related Topics

- [Specifying the destination environment](#) on page 45

To specify Crystal Enterprise 10 as a source environment

1. Choose **Crystal Enterprise 10** from the **Source** list.
2. Enter the name of the source CMS in the **CMS Name** field.
3. Type a User Name and Password that provide you with administrative rights to the source environment.
4. Click **Next**.

The "Destination environment" screen appears.

Related Topics

- [Specifying the destination environment](#) on page 45

To specify BusinessObjects Enterprise XI or XI Release 2 as a source environment

1. Choose **BusinessObjects Enterprise XI** or **BusinessObjects Enterprise XI Release 2** from the **Source** list.
2. Enter the name of the source CMS in the **CMS Name** field.
3. Type a User Name and Password that provide you with administrative rights to the source environment.
4. Click **Next**.

The "Destination environment" screen appears.

Related Topics

- [Specifying the destination environment](#) on page 45

To specify a BusinessObjects Enterprise XI 3.x source environment

1. Choose **BusinessObjects Enterprise XI 3.x** from the **Source** list.
2. Enter the name of the source CMS in the **CMS Name** field.
3. Type a User Name and Password that provide you with administrative rights to the source environment.
4. Select the Authentication method for the Administrator account from the **Authentication** field.
5. Click **Next**.

The "Destination environment" screen appears.

Related Topics

- [Specifying the destination environment](#) on page 45

To specify a Business Intelligence Archive Resource file as a source environment

1. Choose **Business Intelligence Archive Resource (BIAR) File** from the **Source** list.
2. Browse to the location of the file in the **BIAR file** field.

Note:

If you export content to a BIAR file, and you've selected more content than will fit in a single file, the Import Wizard exports the content to multiple BIAR files. To import content that is stored in these files, it is only necessary to select the head BIAR file. The Import Wizard automatically imports the content from the other files.

3. Click **Next**

The "Destination environment" screen appears.

Related Topics

- [Specifying the destination environment](#) on page 45

To specify a Text file as a source environment

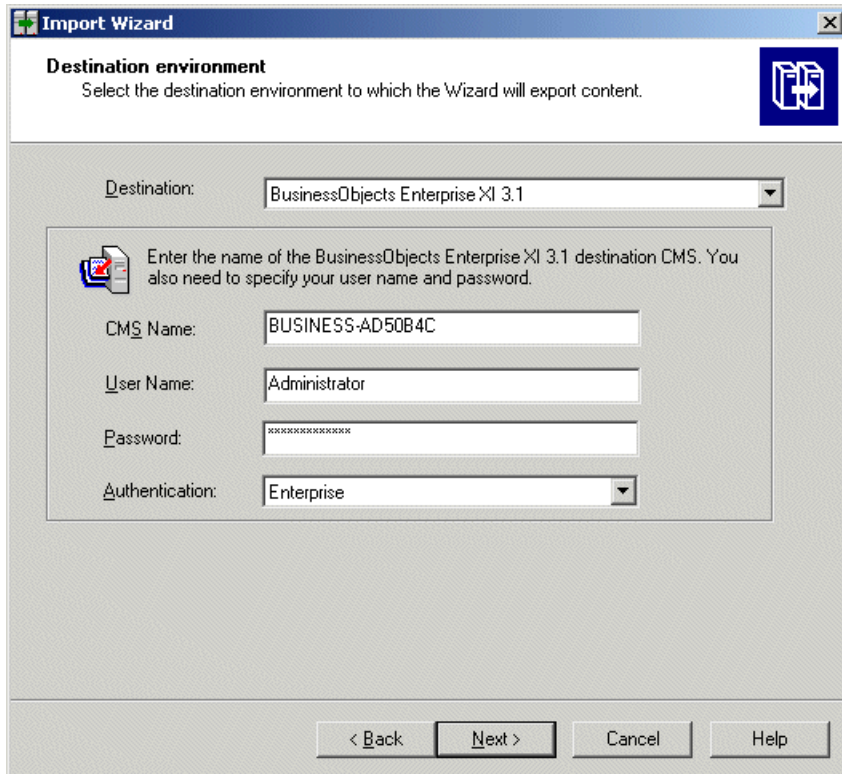
1. Choose **Text File** from the **Source** list.
2. Browse to the location of the file in the **Text file** field, and then click **Next**.
The "Destination environment" screen appears.

Related Topics

- [Specifying the destination environment](#) on page 45
- [Using text files with the Import Wizard](#) on page 73

Specifying the destination environment

After you have specified your source environment you must specify a destination environment.



There are two choices of destination environments for BusinessObjects Enterprise XI 3.x:

1. BusinessObjects Enterprise XI 3.x - your content will be placed into the CMS system database and/or the File Repository Server (FRS) file system according to the objects you select.
2. Business Intelligence Archive Resource (BIAR) File - your content will be placed in a compressed file for backup or importing into a different deployment.

Note:

- The BIAR file destination is only available if your source environment is XI 3.x or higher.
- The BIAR file destination is not available if your source is also a BIAR file.

- If the content that you choose to export is too large for a single BIAR file, the content is exported to multiple BIAR files. The Import Wizard puts the files into the same directory.

To set the destination environment

Select the destination environment to which the wizard will export content. You can choose between:

- BusinessObjects Enterprise XI 3.x
 - Business Intelligence Archive Resource (BIAR) File
1. If you chose to export to a BusinessObjects Enterprise XI 3.x CMS system repository:
 - a. Type the name of the destination environment's Central Management Server in the **CMS Name** field.
 - b. Enter a User Name and Password of an Enterprise account that provides you with administrative rights to the BusinessObjects Enterprise system.
 - c. Select the Authentication method for the administrator account from the **Authentication** list.
 2. If you chose to export to a Business Intelligence Archive Resource (BIAR) File:
 - a. Specify the name and location where you want the BIAR file to be stored.
 3. Click **Next** to continue.
The "Select Objects to Import" screen appears.

Selecting objects to import

The "Select objects to import" screen displays a list of objects that you may select from the source environment to import to the destination environment. The options that appear depend on the source environment and its version.

Once you have selected the objects that you want to import, click **Next** to continue.

Note:

- Server groups are imported without their member servers. After the import is complete, you need to manually add the desired servers to the imported server groups.

If you do not manually add the servers, the server groups are not valid, and you will not be able to run any reports that depend on the server groups.

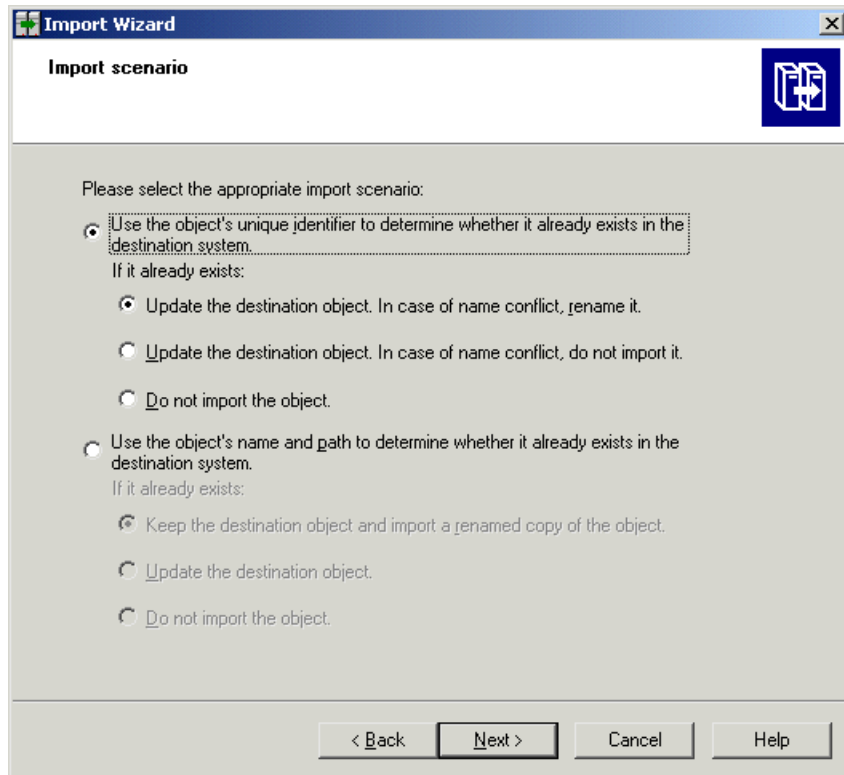
- If you import documents without importing any related universes, and those universes don't already exist on the destination environment, the imported documents lose the relationship with their universes.
- If you import objects that have rights attached to them, and you want to import object rights for the objects, you must either import the users and groups for whom the rights are set, or ensure that the users and groups already exist on the destination environment.
- If you are importing root level objects from BusinessObjects Enterprise XI Release 2, BusinessObjects Enterprise XI 3.x, or from and XI 3.x BIAR file, you can also import the rights that have been explicitly specified on the root level folders. To do this, on the "Import users and user groups" screen, select **Import root folder rights**.
- If you import reports that use repository objects, and you do not also import those repository objects, those repository objects must already exist on the destination environment.
- If you want to import universe overloads, you must ensure that you also import the appropriate users, groups, and universes.
- If you want to back up your server configuration settings to a BIAR file so that you can restore them later, select **Export server configuration**.

Selecting an import scenario

After choosing which objects you want to import, the "Import scenarios" screen appears. This screen allows you to select an appropriate import scenario. These scenario options provide the opportunities to add, overwrite, or reject objects that may have the same Name or CUID (unique cluster identification) in the destination CMS system database.

The specific scenarios that are available to you depends on the source environment that you selected for the import.

To select an import scenario when importing from BusinessObjects or XI 3.x



When you are importing an object from BusinessObjects 5.x/6.x, BusinessObjects Enterprise XI 3.x, or from an XI 3.x BIAR file to an XI 3.x destination environment, you have two options to identify the object and determine if the object already exists on the destination environment:

1. Use the source object's unique identifier (CUID).
2. Use the source object's name and path.

You must decide how you would like the Import Wizard to handle scenarios where the objects already exist on the destination environment.

The following table describes the options that are available to you if are matching by CUID, and the Import Wizard finds existing objects on the destination.

Table 5-1: Option 1. If the Import Wizard detects an object in the destination with the same unique identifier:

Action	Description
Update the destination object. In case of name conflict, rename it.	<p>If the Import Wizard finds an object in the destination environment with the same CUID, it updates the destination's object.</p> <p>If the Import Wizard does not find an object in the destination environment with the same CUID, but it finds an object with the same name, it imports the object from the source environment and then renames that object.</p>
Update the destination object. In case of name conflict, do not import it.	<p>If the Import Wizard finds an object in the destination environment with the same CUID, it updates the destination's object.</p> <p>If the Import Wizard finds an object on the destination environment with the same name but different CUID, it does not import the object from the source environment.</p>
Do not import the object.	If Import Wizard finds an object on the destination environment with the same CUID, it does not import the object.

The following table describes the options that are available to you if you are matching by name and path, and the Import Wizard finds existing objects on the source environment.

Table 5-2: Option 2. If the Import Wizard detects an object in the destination with the same name and path:

Action	Description
Keep the destination object and import a renamed copy of the object.	If Import Wizard finds that an object already exists on the destination environment with the same name and path, it imports the source's object and renames it. After the import, both the destination's original and the source's versions are on the destination.
Update the destination object.	If Import Wizard finds that an object already exists on the destination environment with the same name and path, it updates the destination environment's version with the source's.
Do not import the object.	If Import Wizard finds that an object already exists on the destination environment with the same name and path, it does not import the source's version.

Note:

- Matching objects by name and path is only supported for the following object types:
 - Folders and objects under public folders and personal folders
 - Corporate Categories
 - Personal Categories
 - Universes, Overloads and Connections

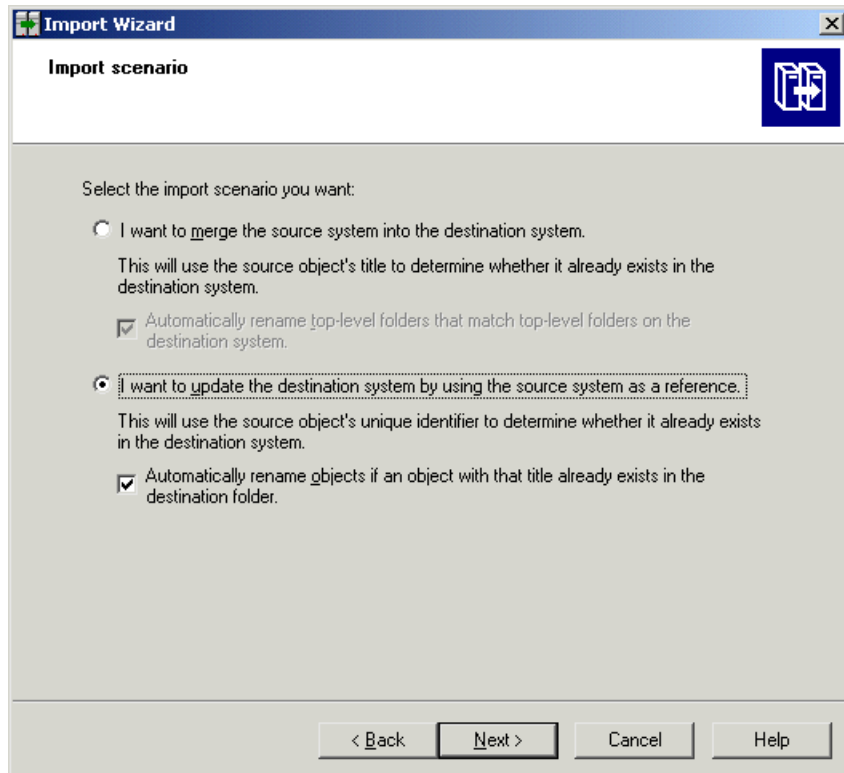
- Dashboards
- Profiles
- Schedules

All other object types will use the matching by unique identifier scheme.

- Matching objects by name and path is not an option when importing content from a BIAR file. When you import from BIAR files, objects will be matched by CUID.
- If you choose update objects on the destination, whether you are matching objects by CUID or name and path, you can choose incremental import options on the next screen. These options allow you to specify which types of objects that you want the Import Wizard to overwrite, and which types of objects you want to leave untouched.

After selecting the appropriate import scenario, click **Next** to continue.

To select an import scenario when importing from other versions



When you are importing content from Crystal Enterprise 10, or BusinessObjects Enterprise XI, you can either merge the source and destination environments, or you can update the destination environment without merging.

Note:

When you are importing content from Crystal Enterprise 9, the Import Wizard only matches by CUID. If the Import Wizard finds an object on the destination with the same CUID as on the source environment, it automatically imports the source object and renames it.

Action	Description
<p>I want to merge the source system into the destination system</p>	<p>The Import Wizard uses the object's name and path to determine if the source object already exists on the destination system. The Wizard adds all the selected objects from the source to the destination without overwriting objects on the destination environment. All of the objects on the destination environment are preserved.</p>
<p>Automatically rename top-level folders that match top-level folders on the destination system.</p>	<p>If the Import Wizard finds top-level folders with the same name and path on both the source and destination environments, the Wizard renames and imports the source folders.</p> <p>If you do not choose this option, the Import Wizard does not update matching top-level folders.</p>
<p>I want to update the destination system by using the source system as a reference.</p>	<p>The Import Wizard uses an object's CUID to determine if the source object already exists on the destination environment. All of the selected objects from the source are added to the destination, but if the source object has the same CUID as an object on the destination, and you choose to overwrite objects on the "Incremental import" screen, the destination object is overwritten.</p>

Action	Description
Automatically rename objects if an object with that title already exists in the destination folder.	The Import Wizard renames objects from the source that have the same name and path but a different CUID. If you do not choose this option, the Import Wizard does not import the object.

Note:

- If you choose to update the destination system by CUID, you can choose incremental import options on the next screen. These options allow you to specify which types of objects that you want the Import Wizard to overwrite, and which types of objects you want to leave untouched.
- When CUIDs are changed, links between documents, rules, and other objects that refer to each other using CUIDs may be impacted. If you import objects with links to other objects, the safest option for migration is the second option (Updating the destination environment).

1. Select the type of import scenario you want.

Note:

Repository objects used by Business views are always imported in Update mode, even when the Merge option is selected.

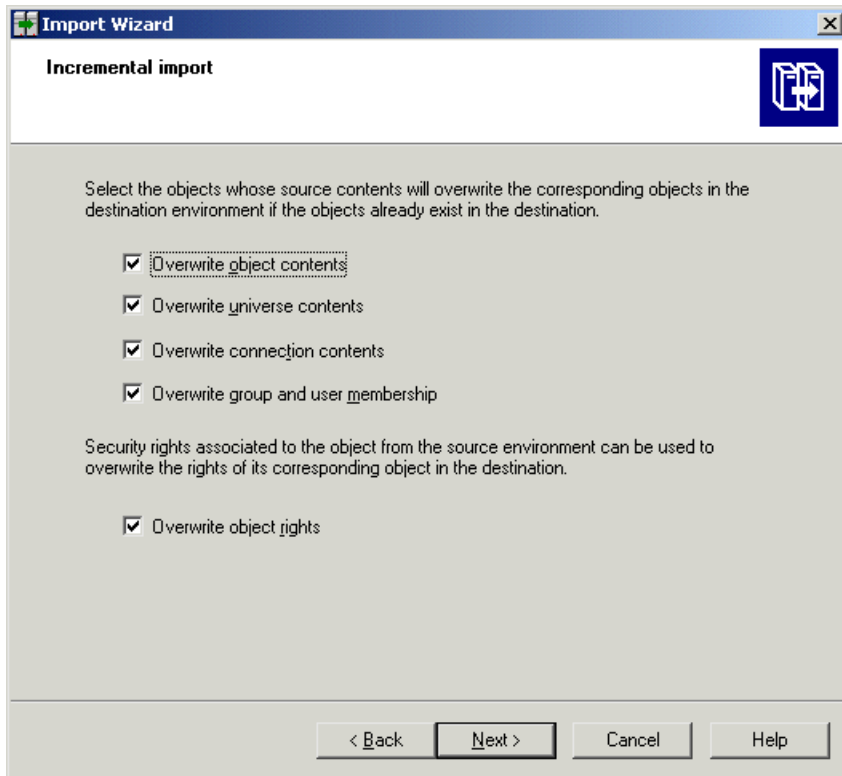
2. Decide if you want the documents or folders to be renamed during the import.
 - If you want the Import Wizard to automatically rename a folder or object that already exists in the destination environment, select the check box.
 - If you don't want automatic renaming, ensure that the check box is clear.
3. Click **Next** to continue.

Related Topics

- [Selecting incremental import options](#) on page 56

Selecting incremental import options

if you are updating objects that already exist on the destination environment, the "Incremental import" screen appears. This screen prompts you to specify what type of objects and rights to want to overwrite on the destination environment with the objects from the source environment, when there is a match found. These options are safeguards that will override what you selected on the "Import Scenarios" screen.



For example, if you chose to overwrite objects on the destination environment, but do not want to overwrite universe objects, you can chose to not overwrite universes by ensuring the **Overwrite universe contents** is not selected.

This screen allows you the following options:

Option	Description
Overwrite object contents	If the Import Wizard finds a matching object on the destination environment, it overwrites the object. An object refers to any type of object except universes, universe connections, and groups.
Overwrite universe contents	If the Import Wizard finds a matching universe on the destination, it overwrites the universe.
Overwrite connection contents	If the Import Wizard finds a matching universe connection on the destination, it overwrites the connection.
Overwrite group and user membership	<p>If the Import Wizard finds matching groups on the destination, it replaces the group membership information on the destination with the group membership information of the source.</p> <p>If you do not choose to overwrite group membership, the Import Wizard adds new members and leaves existing members untouched.</p>

Option	Description
Overwrite object rights	<p>If the Import Wizard finds a matching object on the destination environment, and the users or groups that the object's rights pertain to are either on the destination or are being imported, the wizard overwrites any existing rights on the object for those users or groups.</p> <p>If you do not select to overwrite object rights, the Import Wizard adds any new rights to the object that aren't already specified on it. It does not add or modify any existing rights on the object.</p>

1. Select the appropriate import options.
2. Click **Next** to continue.

Selecting security migration options

When you are importing from BusinessObjects 5.x or 6.x, the "Security migration options" screen appears. This allows you to choose if you want the security on the objects to be imported. There are three options available:

- Yes, migrate security on imported objects and secure the destination system. This is the most secure option.
- Yes, migrate security on imported objects. Users in the destination system may receive more rights than in the source.
- No, don't migrate security. Select this option only if you intend to rebuild security from scratch.

1. Select a security migration option.
2. Click **Next** to continue.

Selecting specific objects to import

This procedure assumes you have already specified the source and destination environment and selected the type of objects to import. It also assumes you have chosen an import scenario and the appropriate incremental import options. If you have not already started the Import Wizard, see [Specifying the source environment](#) on page 40, [Specifying the destination environment](#) on page 45 and [Selecting objects to import](#) on page 47. For further information about import scenarios, see [Selecting an import scenario](#) on page 48. For further information about incremental imports, see [Selecting incremental import options](#) on page 56

After you choose an import scenario and incremental import options, you are prompted to choose the specific objects you want to import. You can import all of the objects or select individual objects.

To select users and groups

If you chose to import users and groups, the "Users and Groups" screen appears.

1. Select the users or groups you want to import.

If you want to select groups without selecting users, hold SHIFT and click the groups. You should select this option when you are importing groups from one environment to another where the groups are the same but the users are different. This option lets you maintain the rights set at the group level, without having to import users.

You may also select the following check boxes:

- **Show groups hierarchically**
- **Select groups that contain selected users**
- **Import BCA Publisher profiles for selected users and groups**

2. Click **Next** to continue.

To select group import options

The "Import Groups Options" screen appears if you are importing users and groups from BusinessObjects 5.x or 6.x.

1. Select if you want group mappings from LDAP and Active Directory to be migrated to XI 3.x.

Note:

- If the "Import Groups Option" screen appears, the 6.x source and the XI 3.x destination environments are configured for LDAP or Active Directory. You need to have the same LDAP or Active Directory configuration on the source and destination.
- For information about setting alias creation and assignment for LDAP and Active Directory users, see the *BusinessObjects Enterprise Administrator's Guide*.

2. Click **Next**.

To populate database credentials for users

If you are importing users and groups from a BusinessObjects 5.x or 6.x environment, the "Populate database credentials for users" screen appears.

Database credentials are used in universe connections associated with BusinessObjects user accounts.

Universe connections that previously used the *BOUSER* and *BOPASS* variables associated with the BusinessObjects user name and password must now use database credentials (*DBUSER* and *DBPASS*). Those database credentials can be populated by the Import Wizard and later edited in the Central Management Console (CMC) on the properties tab for each user account.

Click **Next** to continue.

1. Chose to either:
 - Populate database credentials with user name and password, which is the recommended procedure.
 - Leave database credentials empty at this time.
2. Click **Next** to continue.

For detailed information on the import of database credentials, see the *BusinessObjects 5/6 to XI 3.1 Migration Guide*.

To select access levels

If you are importing Access Levels, the "Access Levels" screen appears.

Note:

If you import a user and an object, the Import Wizard also imports the rights of that object. If the object's rights are based on an access level, and that level is not imported and does not exist on the destination, the Import Wizard gives the individual rights specified in the level on the object for the user.

1. Select the access levels that you want to import.

The default access levels are:

- Full Control.
- No access.
- Schedule.
- View .
- View on demand.

If you have created any additional access levels, they also appear on the list.

2. Click **Next** to continue.

To select categories

If you are importing categories, the "Categories" screen appears.

1. Select the categories that you want to import.

For large document domains, you can import incrementally, and import documents one category at a time.

2. To import all the objects associated with the category, select the **Import all objects that belong to the selected categories** check box.
3. Click **Next** to continue .

To select folders and objects

If you chose to import folders and objects, the "Select Folders and Objects" screen appears.

1. Select the folders and reports that you want to import.
You can also choose to **Import all instances of each selected object**.
2. Click **Next** to continue.

To select application folders and objects

If you are importing application folders and objects, the "Select application folders and objects" screen appears.

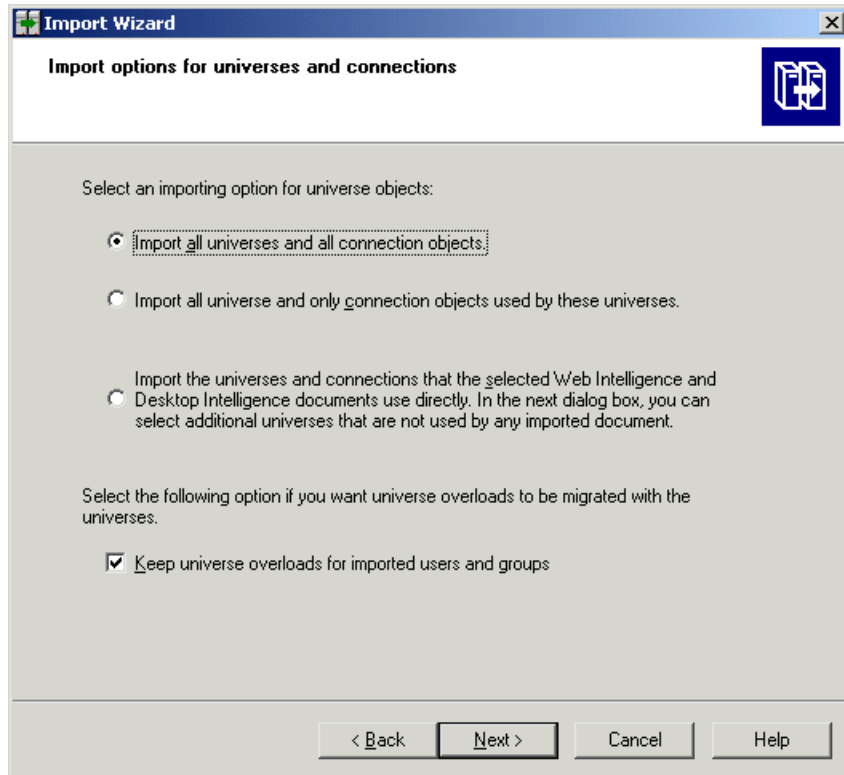
1. Select the application folders and objects that you want to import.
2. Click **Next** to continue.

Note:

If the selected folders and objects exist on the destination system, they will be updated using the source system as a reference.

To select import options for universes and connections

If you chose to import universes, the "Import options for universes and connections" screen appears.



This screen allows you to select one of three options:

- Import all universes and all connection objects.
- Import all universes and only connection objects used by these universes.
- Import the universes and connections that the selected Web Intelligence and Desktop Intelligence documents use directly.

Note:

If you select the third option, you can select additional universes to import on the next screen.

1. Select an import option for the universes and their connections.
2. To import universe overloads, select **Keep universe overloads for imported users and groups**.

If you are importing universe overloads, you must also select the users, groups, and universes during previous steps in the Import Wizard. You must also select **Overwrite object contents** on the "Incremental Import"

screen. If you did not select those options, click **Back** until you get to the appropriate screen, and make the required selections.

Note:

If you choose to import users and groups, universe overloads, and other objects, and do not want to overwrite all of the object rights for the users and groups and objects that you've selected, either:

- Ensure that you've only selected the universes that you want to import, and then import the other objects in another import process.
- Delete the universe overload on the destination environment, and then clear the **Overwrite object contents** and **Overwrite object rights** options on the "Incremental Import" screen. In this case, the Import Wizard only imports the universe overloads that don't already exist on the destination environment.

3. Click **Next** to continue.

To select universe folders and universes

The "Universe folder and universes" screen appears if you are importing universes, and if you selected **Import the universes and connections that the selected Web Intelligence and Desktop Intelligence documents use directly** on the "Import options for universes and connections" screen .

1. Select the universe folders and universes that you want to import.

If you've selected a source environment other than BusinessObjects 5.x or 6.x, the universes that are linked to specific documents cannot be cleared from the list. You can select additional universes that are not used by any imported document. If no universe is found, the associated documents will not be imported and a warning message appears. If this occurs, link the documents to a universe, republish them to the repository, and retry the import.

2. Click **Next** to continue.

Note:

When you import a universe, its connection objects are imported automatically. Before you can import connection objects from BusinessObjects 5.x/6.x, ensure that the Import Wizard can access the database the same way that the source environment accesses it. This may

involve installing database drivers or configuring connection settings on the machine.

For example, if you import SQL Server connection objects from a BusinessObjects 6.x source environment, you must configure the connections on the destination machine via the ODBC Data Source Administrator settings in the Windows Start Menu Control Panel before you import the connection objects. You must use the exact same name and settings as the connection used on the source machine when you created the domain key.

To select import repository objects options

If you chose to import reports that use repository objects, the "Import repository objects options" screen appears. This allows you to select one of three options:

- Import all repository objects.
- Import only repository objects that the selected reports use directly.

Warning: This may affect business view object integrity.

- Import repository objects that the selected reports use directly, as well as any other repository objects they depend on.

1. Select one of the three options.
2. Click **Next** to continue.

To select import options for publications

The "Import options for publications" screen appears if you are importing profiles or publications.

1. Select one of the following options for importing profiles:
 - **Import all profiles.**
 - **Import profiles used by selected publications.**
2. Select one of the following options for importing publication recipients:
 - **Import recipients used by selected publications.**
 - **Do not import recipients.**
3. Click **Next** to continue.

To select remote connections and replication jobs

If you chose to import remote connections and replication jobs, the "Remote Connections and Replication Jobs" screen appears.

1. Select the remote connections and replication jobs that you want to import.
2. Click **Next** to continue.

To select personal documents and inbox documents

If you chose to import personal documents or inbox documents from BusinessObjects 5.x or 6.x, the "Personal documents and inbox documents" screen appears.

Note:

If you are importing from Crystal Enterprise or any version of BusinessObjects Enterprise XI, the Import Wizard always imports the personal documents, inbox documents, and favorite folders for all selected users.

1. To import inbox documents, you can
 - Import unread inbox documents.
 - Import read documents from the location that you specify.
 - Import inbox documents received after the date that you specify.
2. To import personal documents, you can
 - Import personal documents from the location that you specify.
 - Import personal documents that were modified or created after the date that you specify.
3. Click **Next** to continue.

To select Broadcast Agent Publisher External Users and Groups

If you chose to import Broadcast Agent Publisher external users and groups from a "BusinessObjects 5.x" or 6.x source environment, the "Broadcast Agent Publisher External Users and Groups" screen appears.

1. Select the external users and groups that you want to import.

To select groups without selecting the users in those groups, hold SHIFT , and select the groups.

You can also choose to **Select groups that contain selected users and Import BCA Publisher Profiles for selected users and groups**

2. Click **Next** to continue.

To select Broadcast Agent Publisher Publications

If you chose to import Broadcast Agent Publisher Publications from a "BusinessObjects 5.x" or 6.x source environment, the "Broadcast Agent Publisher Publications" screen appears.

1. Select the Broadcast Agent Publisher publications you want to import.
You can also choose to **Automatically import associated schedules and Automatically import BCA Publisher profiles for selected publications.**
2. Click **Next** to continue.

To select Broadcast Agent Publisher Profiles

If you are importing Broadcast Agent Publisher Profiles from a "BusinessObjects 5.x" or 6.x source environment, the "Broadcast Agent Publisher Profiles" screen appears.

1. Select the profiles that you want to import.
2. Click **Next** to continue.

To select domains and documents

The "Domains and Documents" screen appears if you chose to import any of the following document types from a BusinessObjects 5.x or 6.x source environment:

- Web Intelligence
- Desktop Intelligence (BusinessObjects)
- Performance Management (Application Foundation)
- Analytics (Performance Management) (6.x only)

- Third-party

The list contains a separate branch for each domain. Domains that cannot be opened are greyed out. If you previously chose to import all the documents of a given category, they are preselected and cannot be cleared.

1. Select the domains and documents you want to import .
2. Click **Next** to continue.

To select locales and platform options

The "Select Locales and Platform options" screen appears when you are importing Web Intelligence 2.x or BusinessObjects documents from a BusinessObjects 5.x or 6.x source environment.

Note:

The Import Wizard converts Web Intelligence 2.x documents (.wqy) into the .wid format before importing them.

In a BusinessObjects 5.x/6.x repository, some Web Intelligence 2.x (.wqy) documents and BusinessObjects documents may not store their locales. In order to set locales in these documents when they are saved in the CMS (after conversion to .wid), the default locales provided by the user are added to the documents.

1. Select the default locale of the documents to import.
2. Select the default locale of the platform used to create documents to import.

If they are not already saved in the documents, these locales will be saved during the import.

3. Click **Next** to continue.

Finalizing the Import

Free disk space warning

If your destination environment does not contain enough disk space to contain all of the objects that you want to import, the free disk space warning for temporary folder notice is displayed.

The Import Wizard copies the objects that you select to your destination environment's temporary directory, as specified in the *Temp* environment variable.

If the free disk space warning appears, and there is not enough room in the destination environments *Temp* directory:

1. Click **Back** to return to the previous dialog box.
2. Either free up additional disk space on the destination environment or specify a new location for the temporary directory by modifying the *Temp* variable on the destination environment.
3. On the dialog box, click **Next**.

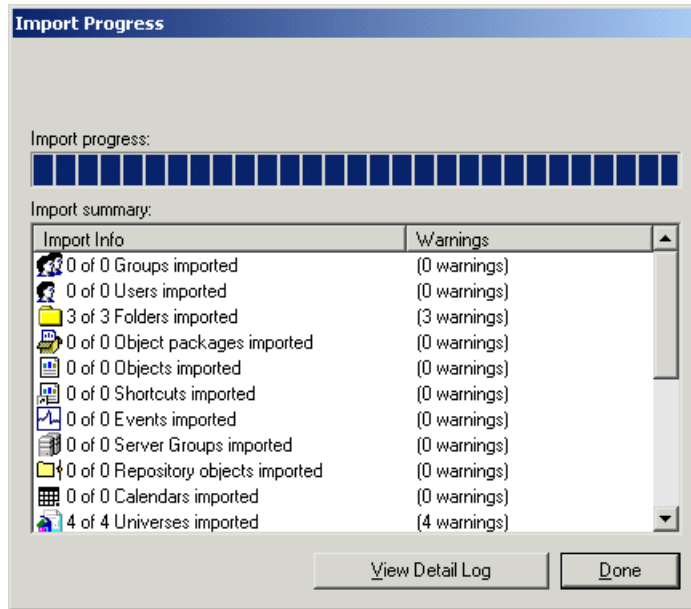
Preparing for import

After you select the import options, the "Ready to import" dialog box appears. This dialog box displays a list of all of the objects that you selected.

1. Review the list to verify that it contains everything that you selected.
If you want to make any changes to the list, click **Back** until you get to the appropriate dialog box.
2. Click **Finish** to begin importing objects to the destination environment.
The "Import Progress" dialog box appears. It shows the progress of the import and a summary of the events taking place.

Completing the import

The "Import Summary" window appears when the Import Wizard is finished. The window displays a the results of the import.



1. To view the details of the import, click **View Detail Log**.

The "Detail Log" dialog box appears

This dialog box lists all the objects the Import Wizard has migrated and their status, as well as any errors that may have occurred. You can sort the entries according to any column, by clicking the column's heading.

For more details on a given item, select it from the list.

The details are displayed at the bottom of the dialog box.

Note:

The information that appears in the Detail Log is also written to a log file. The log file starts with the name `ImportWiz`, and is located in the `C:\Program Files\Business Objects\BusinessObjects Enterprise 12.0\Logging\` directory by default.

The log file includes a system-generated ID number, a title that describes the imported information, and a field that describes the action and the reason why it was taken.

A version of the log file in `.csv` format is also written, in the same directory.

2. Click **Done**.

If you are importing objects any source environment other than BusinessObjects Enterprise XI 3.x or an XI 3.x BIAR file, the Import Wizard displays a dialog box informing you that it will run a rights verification tool. This tool looks for child objects on the destination that have rights explicitly granted on them that their parent object does not have. If it finds any such objects, the Import Wizard removes the rights on the child.

The details of any rights that have been removed on objects during the import process appear in a .CSV file, located in the `C:\Program Files\Business Objects\BusinessObjects Enterprise 12.0\Logging\` directory by default.

3. If the dialog box appears, click **OK** to start the tool.

The Import Wizard adjusts the rights on imported child objects.

Updating imported events

After you import events to a destination Central Management Server (CMS), you must run the EventUpdater script. This script updates the imported events by associating them with the BusinessObjects Enterprise XI 3.x event servers that they are to run on.

If you do not run this script, you must manually re-associate the events with event servers, by navigating to every imported event and associating it with an event server.

If you are importing events from more than one event server, you must run the script once for each event server that you are importing the events from.

On a Windows computer, the script is called `EventUpdater.bat`, and is located in the `c:\Program Files\Business Objects\BusinessObjects Enterprise 12.0\win32_x86\scripts\` folder by default.

On a UNIX computer, the script is called `EventUpdater.sh`, and is located in the `./boobje/` directory.

The following table describes the parameters for the script.

Parameter	Description
<i>-oldeventserver</i>	The friendly name of the event server on the system that the event was exported from.
<i>-neweventserver</i>	The name of the event server on the XI 3.x system that you want to associate the event with.
<i>-cms</i>	The name of any CMS on the XI 3.x destination system.
<i>-user</i>	The username for a BusinessObjects Enterprise administrator account.
<i>-password</i>	The password for the BusinessObjects Enterprise administrator account.
<i>-authentication</i>	The authentication method. The accepted values are secEnterprise, secWinAd, and secLdap.

1. Locate the appropriate script, depending on your platform.
2. Run the script with the necessary parameters.

- On Windows, run

```
c:\Program Files\Business Objects\BusinessObjects Enterprise 12.0\win32_x86\scripts\eventupdater.bat" -oldeventserver <old event server friendly name> -neweventserver <new event server name> [-cms <cms>] [-user <username>] [-password <password>] [-authentication secAuthType]
```

- On UNIX, run

```
./bojje/eventupdater.sh -oldeventserver <old event server friendly name> -neweventserver <new event server name> [-cms <cms>] [-user <username>] [-password <password>] [-authentication secAuthType]
```



Using text files with the Import Wizard



chapter

The Import Wizard can import any of the following from text files:

- Users
- Groups
- Profiles
- Data source credentials

A combination of users, groups and profiles can be in one file, but data source credential must be in a separate text file.

Text file format

All text import file data must be in the comma-separated value (CSV) file format. The CSV format stipulates the following:

- The comma (,) is the default separator.
- The default delimiter is double quotes (").
- The fields that contain a separator must begin and end with a delimiter.

For example, if you wanted the value Smith, John in a field, you would enter "Smith, John".

- The fields that contain a delimiter, must begin and end with a delimiter and use two delimiters where one is required.

For example, if you wanted the value "quotes", you would enter ""quotes"", if your delimiter was double quotes. If your delimiter was a single quote ('), and you wanted the value dog's, you would enter 'dog's'.

Note:

The default delimiter and the default separator can be changed on the "Select options for file import" dialog box.

Importing users, groups and profiles

The Import Wizard can import users, groups and profiles from text files. Files used to import users, groups or profiles must be structured as follows:

- Each row in the text file defines 1 record.

- Each record consists of 6 fields.
- Each field must have separator between it and the next field.
- Each field, can potentially be blank except for field 1.

One single record can define either a group or a user or a group, a user and a profile. Text files must be saved in UTF-8 format.

Note:

- The default separator is a comma but this can be changed on the Select options for file import dialog box.
- If a character in the any field of the record is the same as the character used for a separator it must be delimit. The default delimiter character is a double quote.

User record Format

Field Number	Contents of field
Field 1	Group name
Field 2	User Name
Field 3	Full name of user
Field 4	Email address of user
Field 5	Profile name for user.
Field 6	Profile value for user.

Note:

Profile values must be enclosed in quotes. See [Text file format](#) on page 74 for information on using delimiter.

Example user record

Sales,Psanders,Paula Sanderson,psanders@Acme.com,Manager,West Region

The previous record would create an account name or username of "psanders" in BusinessObjects Enterprise. The name Paula Sanderson, and the e-mail address of psanders@Acme.com would be associated with this account name. The username "psanders" would be member of the group "Sales". The username psanders and would be assigned the profile "Manager" with the profile value of "West Region".

Group Record Format

Field Number	Contents of field
Field 1	Group name
Field 2	Null
Field 3	Description of group.
Field 4	Field is ignored.
Field 5	Profile name for group.
Field 6	Profile value for group.

Note:

Profile values must be enclosed in quotes. See [Text file format](#) on page 74 for information on using delimiter.

Example Group record

Best,,Group for sales people,,Sales,General

The previous record would create the "Best" group, with description of "Group for sales". The profile Sales would be assigned the profile value "General".

Importing data source credentials

The Import Wizard can import data source credentials from text files. These are the database credentials used for Business Object Universes. Files used to import secondary database credentials must be structured as follows:

- Each row in the text file defines 1 record.
- Each record consists of 3 fields.
- Each field must have separator between it and the next field.
- Each database username must be associated with a Enterprise username that already exists.

Field Number	Contents of field
Field 1	Existing username
Field 2	Database Username
Field 3	Database password

Example database credential

```
Psanders,dbuser,Dbpasw0rd
```

The previous example create the account name "dbuser" and the password "Dbpasw0rd" associated with Enterprise user Psanders. The option "Enable Data Source Credentials for Business Object Universes" would also be selected for username Psanders.

6 | Using text files with the Import Wizard

Importing data source credentials



Backing up and restoring server configuration settings



7

chapter

The Import Wizard lets you to back up your server configuration settings to a BIAR file, and then use that BIAR to restore those settings at a later date.

Server groups are objects that group related servers together. If you are restoring servers and you are not restoring their related server groups, and the destination system does not contain the same server groups (matched by CUID), you lose the relationship between the server group and the exported server. When you re-import the server, you need to either manually add the server to the desired server groups or create new server groups.

You can set up reports to run on particular server groups. If you are exporting reports and the related server groups are not imported, and do not already exist on the destination, the reports lose their relationship to the server group. If you want the report to use particular server group, and that group does not exist on the destination, you need to manually configure the server groups.

Similarly, if you are importing servers, server groups, or reports without importing the users that have rights on those objects, and those users do not already exist on the destination environment, the rights on those objects are dropped. You may have security settings on those objects that are not correctly set.

Note:

- The Import Wizard supports the backing up and restoring of entire deployments, including all of the servers and nodes in the deployments.
- The Import Wizard Command Line Tool does not support the importing and exporting of server configuration settings.
- If your destination deployment already has servers with the same server identifier as the servers in your BIAR file, then those servers may fail to import. If the import process fails, determine which servers on the destination system have conflicting server identifiers. You can see the server list by viewing the Import Wizard's Detail Log, or by opening the log file `ImportWiz.log`.

If there are servers that conflict because they have the same server identifiers, use the CMC to delete those servers from the destination deployment, and repeat the server import process.

By default, `ImportWiz.log` is located in `C:\Program Files\Business Objects\BusinessObjects Enterprise 12.0\Logging\`

To back up server configuration settings to a BIAR file

1. Specify the BusinessObjects Enterprise XI 3.x system as the source environment.
2. Specify **Business Intelligence Archive Resource (BIAR) File** as the destination environment.
3. On the "Select objects to import" screen, select **Export server configuration**, and click **Next** until the "Ready to Import" screen appears.
4. On the "Ready to Import" screen, click **Finish** to start the import.
The "Import Progress" screen appears. After the import is complete, the dialog box displays a summary of the import.
5. Click **Done** to close the Import Wizard.

All of the servers in your BusinessObjects Enterprise deployment are backed up on the BIAR file.

To restore server configuration settings

Before you restore the server configuration settings from a BIAR file, you should first backup your existing configuration. Once you restore the configuration settings, the only way to revert back to the state before the restore is by importing the settings from the second BIAR file.

It is recommended that when you add or delete a BusinessObjects Enterprise server from a BusinessObjects Enterprise cluster, you export the server configuration settings for the entire cluster to a BIAR file. This prevents a situation where the cluster contains more servers than the BIAR file that you are importing from does, so that you do not have to manually delete the servers before restoring your server configuration settings from the BIAR file.

Note:

- If you've created additional servers or nodes after you backed up your configuration settings, and use the Import Wizard to restore the configuration settings, the Import Wizard doesn't update or delete these servers or nodes. However if such servers used configuration templates then they can become reconfigured. This is because during restore process the configuration templates are updated, affecting the server's

configuration. If you want to get your system to the same server configuration state as it was at the time of the backup, and your BusinessObjects Enterprise deployment has more servers than the BIAR file that you are restoring from does, you may want to delete the servers through the CMC before you restore. If you delete servers from your BusinessObjects Enterprise deployment, you must ensure that the deployment has at least one CMS to run the Import Wizard.

- Do not restore server configuration settings from a Windows deployment to a UNIX deployment or from a UNIX deployment on a Windows deployment. Always restore server configuration settings from a Windows deployment to a Windows deployment and from Unix deployment to Unix deployment.
1. Specify the BIAR file that contains the server configuration settings that you want to import as the source environment.
 2. Specify your BusinessObjects Enterprise XI 3.x system as the destination environment.
 3. On the "Select objects to import" screen, select **Restore Full Cluster Server Configuration**, and click **Next**.

Note:

If you select **Import node(s) from a different cluster**, you can't select **Restore Full Cluster Server Configuration**.

4. On the "Import Scenarios" screen, specify what you want the Import Wizard to do if it finds an object with the same unique identifier on the destination environment.

Note:

When you are importing objects from a BIAR file, the option to match objects by name and path is not available.

The options that you can select are:

- **Update the destination object, in case of name conflict, rename it.**

Use this option when you want to restore all server objects that are in a BIAR file to a deployment. If the deployment already has other servers with the same names, then some of the updated servers may be renamed.

If a server in the BIAR files has a unique identifier that matches a server's unique identifier on the deployment, then the server on the

deployment will be overwritten with the configuration settings of the server located in the BIAR file.

If, during the import process, the Import Wizard discovers that the deployment already has another server with the same name as the server from the BIAR file, the Import Wizard imports the server and renames it. The server's new name will be server name as it appears in the BIAR file, appended with a number in brackets.

- **Update the destination object, in case of name conflict, do not rename it.**

Use this option when you want to restore all server objects from the BIAR file to a deployment, except the servers with different unique identifiers but with the same names.

- **Do not import the object**

Use this option if you do not want servers on deployment to be overwritten with settings from the BIAR file. This will cause only servers not existing on your deployment (but existing in the BIAR file) to be restored.

See [Restoring server configuration scenarios](#) on page 83 for examples that describe how server configuration settings can be restored from BIAR files.

5. On the "Incremental import" screen, select whether you want to overwrite object contents or overwrite right contents.
6. Click **Next** until the "Ready to Import" screen appears.
7. On the "Ready to Import" screen, click **Finish**.
The "Import Progress" screen appears. After the import is complete, the screen displays a summary of the import.
8. Click **Done** to close the Import Wizard.

Restoring server configuration scenarios

This section describes scenarios for using the Import Wizard to restore server configuration settings from a BIAR file, and illustrates how selecting different import scenarios affects how server settings are imported.

For all of the scenarios, the initial configuration is described in the following tables.

Table 7-1: Initial Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value
mynode.cms	1	Request Port	6401
mynode.eventserver	2	Maximum Idle Time	2

When you export these settings to a BIAR file, the file contains the same server settings.

Table 7-2: Initial Server Configuration Settings in the BIAR file

Server Name	Unique Identifier	Property	Value
mynode.cms	1	Request Port	6401
mynode.eventserver	2	Maximum Idle Time	2

All of the following scenarios assume that we are importing the server configuration settings from this BIAR file.

Suppose that you modify the server configuration settings on the deployment so that the deployment now has the configuration settings described in the following table.

Table 7-3: New Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value
mynode.cms	1	Request Port	6402
mynode.eventserver	2	Maximum Idle Time	3

The following two scenarios describe how the options on the "Import scenario" screen affect the process of restoring server configuration settings from the BIAR file.

Scenario 1

This scenario describes what the Import Wizard does when, on the Import scenario screen, you select **Use the object's unique identifier to determine whether it already exists in the destination system**, and then select one of the following options.

- **Update the destination object. In case of name conflict, rename it,**
or
- **Update the destination object. In case of name conflict, do not import it.**

The deployment's initial configuration settings are described in the following table.

Table 7-4: Initial Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value
mynode.cms	1	Request Port	6402

Server Name	Unique Identifier	Property	Value
mynode.eventserver	2	Maximum Idle Time	3

When you import the servers from the BIAR file, the Import Wizard finds servers in the BIAR file and on the deployment with matching unique identifiers. The Import Wizard overwrites the values on the deployment with the values from the BIAR file. In other words, the deployment's original settings are restored.

The server configuration settings on the deployment after this workflow are described in the following table.

Table 7-5: New Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value
mynode.cms	1	Request Port	6401
mynode.eventserver	2	Maximum Idle Time	2

Scenario 2

This example explains what happens when, on the Import scenario screen, you select the **Use the object's unique identifier to determine whether it already exists in the destination system.** and **Do not import the object** options.

The deployment's initial configuration settings are described in the following table.

Table 7-6: Initial Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value
mynode.cms	1	Request Port	6402
mynode.eventserver	2	Maximum Idle Time	3

When you match by unique identifier and choose the **Do not import the object** option, the Import Wizard finds servers with the matching unique identifiers, and does not import the server configuration settings. The servers on the deployment are not updated.

Scenario 3

The following examples show what happens when you modify the server configuration settings on the deployment, and then try to restore the settings from the BIAR file that you imported the settings to. Suppose that you make the following three changes on the deployment.

- Rename the mynode.cms server to mynode.primarycms.
- Add a new server, called mynode.cms, with the Request Port property set to 6404.

When a new server is added, it is automatically assigned a new unique identifier.

- Delete the event server.

The following table describes the server settings on the destination deployment after these modifications.

Table 7-7: Server Configuration Settings on the Destination Deployment

Server Name	Unique Identifier	Property	Value
mynode.primarycms	1	Request Port	6402
mynode.cms	3	Request Port	6404

When you restore the server configuration settings from the BIAR file, the particular settings that are imported to the deployment depends on the options that you select on the "Import scenarios" screen.

Scenario 3.1

Suppose that you use the Import Wizard to restore the server configuration settings from the BIAR file, and that on the Import scenarios screen, you select **Use the object's unique identifier to determine whether it already exists in the destination system** and **Update the destination object, in case of name conflict, rename it.**

Use this option when you want to restore all servers from a BIAR file to a deployment.

The deployment's initial configuration settings are described in the following table.

Table 7-8: Initial Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value
mynode.primarycms	1	Request Port	6402
mynode.cms	3	Request Port	6404

When you match by unique identifier and choose the **Update the destination object, in case of name conflict, rename it** option, the Import Wizard finds that the unique identifier for mynode.cms from BIAR is 1, and that the unique identifier of the mynode.primarycms server on the deployment is also 1. However, when it detects that the deployment already has another server with mynode.cms name, it renames the restored server.

Furthermore, because the mynode.cms server doesn't exist in the BIAR file, that server is not updated during the import process.

This results in the deployment described in the following table.

Table 7-9: Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value	Result
mynode.cms(2)	1	Request Port	6401	This server is restored with a new name.
mynode.eventserver	2	Maximum Idle Time	2	This server is restored.
mynode.cms	3	Request Port	6404	This server is not updated, because it does not exist in the BIAR file.

Scenario 3.2

Suppose that you use the Import Wizard to restore the server configuration settings from the BIAR file, and that on the Import scenarios screen, you select **Use the object's unique identifier to determine whether it already exists in the destination system** and **Update the destination object, in case of name conflict, do not import it**.

Use this option when you want to restore all server objects from a BIAR file to a deployment, except servers with different unique identifiers but with the same name.

The deployment's initial configuration settings are described in the following table.

Table 7-10: Initial Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value
mynode.primarycms	1	Request Port	6402
mynode.cms	3	Request Port	6404

When you match by unique identifier and choose the **Update the destination object, in case of name conflict, do not import it** option, the Import Wizard does not import the server settings from the BIAR file for mynode.cms, even though the unique identifiers of mynode.cms (in the BIAR file) and mynode.primarycms (on the deployment) are the same. This is because the Import Wizard detects a server on the destination with the same name, and does not import the server.

The results in the deployment are described in the following table.

Table 7-11: Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value	Result
mynode.primarycms	1	Request Port	6402	This server is not updated.
mynode.eventserver	2	Maximum Idle Time	2	This server is restored.

Server Name	Unique Identifier	Property	Value	Result
mynode.cms	3	Request Port	6404	This server is not updated, because it does not exist in the BIAR file.

Scenario 3.3

Suppose that you use the Import Wizard to restore the server configuration settings from the BIAR file, and that on the Import scenarios screen, you select **Use the object's unique identifier to determine whether it already exists in the destination system** and **Do not import the object** on the "Import scenario" screen.

Use this option when you do not want the servers on a deployment to be overwritten by servers from a BIAR file. This option only restores servers that do not exist on the deployment, but that are in the BIAR file.

The deployment's initial configuration settings are described in the following table.

Table 7-12: Initial Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value
mynode.primarycms	1	Request Port	6402
mynode.cms	3	Request Port	6404

When you match by unique identifier and choose the **Do not import the object** option, the Import Wizard does not import the server settings from

the BIAR file for mynode.cms, even though the unique identifiers of mynode.cms (on the BIAR file) and mynode.primarycms (on the destination environment) match. This is because you've selected to not import objects where the source and destination environments have the same unique identifier.

The results in the deployment are described in the following table.

Table 7-13: Server Configuration Settings on the Deployment

Server Name	Unique Identifier	Property	Value	Result
mynode.primarycms	1	Request Port	6402	This server is not updated, because you've chosen not to overwrite existing servers on the deployment.
mynode.eventserver	2	Maximum Idle Time	2	This server is restored.
mynode.cms	3	Request Port	6404	This server is not updated, because it does not exist in the BIAR file.

To import nodes from one cluster to another

There are a number of situations that may require you to re-point existing nodes to different clusters. For example, if you want to add a node to a Production deployment, and want to make the change as smooth as possible, you may want to create the node on a Test deployment, and then re-point it to the Production deployment. Direct migration of nodes between deployments is not supported in BusinessObjects Enterprise XI 3.x, in favor of a more secure method involving import and export of server configuration settings.

In BusinessObjects Enterprise XI 3.x, server configuration information is stored in the CMS database, so instead of moving the node between deployments, you import the server configuration settings from one deployment to the other. You need to first import the node's configuration information to the destination node. You can then re-point the node (Server Intelligence Agent) to the destination cluster.

Note:

If you are importing nodes from one cluster to another, the Import Wizard does not import configuration templates from BIAR files.

To re-point a node on a Test deployment so that the node joins the cluster on the Production deployment:

1. On the Test deployment, start the Import Wizard and export the server configuration settings to a BIAR file. For information on importing nodes to a BIAR file, see *To back up server configuration settings to a BIAR file*.
2. On the Test deployment, stop the Server Intelligence Agent .
3. On the Production deployment , use the Import Wizard to import the node from the BIAR file.
 - a. Start the Import Wizard.
 - b. Select the BIAR file that contains the node as the source environment.
 - c. On the "Select objects to import" screen, select **Import node(s) from a different cluster** , and click Next.
 - d. On the "Import scenario" screen, select what you want the Import Wizard to do if it finds any objects on the destination environment with the same unique identifier.
 - e. On the "Incremental import" screen, select whether you want the Import Wizard to overwrite any objects or object rights that already exist on the destination environment.

- f. On the "Nodes" screen, select the node that you want to import, and click **Next**.
 - g. On the "Ready to Import" screen, click **Finish**.
 - h. On the "Import Progress" screen, click **Done**.
4. If you are not re-pointing all of the nodes that are on the Test deployment, then reconfigure the Test deployment's node that you are re-pointing:
 - If you are re-pointing a node on a Windows deployment, follow these steps.
 - a. On the Test deployment, start the CCM.
 - b. Right-click the node that you imported to the Production environment, and select **Properties > Startup**.
A list of local and remote CMS Servers is displayed.
 - c. Click **Remove**, to remove the link to the CMSs that you are not re-pointing.
 - d. Click **OK**.
 - If you are re-pointing a node on a UNIX deployment, run the `server config.sh` script to remove the link to the CMSs that you are not re-pointing.
5. If the node that you've imported contains a CMS:
 - On Windows, perform the following steps.
 - a. On the Test deployment, start the CCM.
 - b. Right-click the Server Intelligence Agent for the node that you are re-pointing, and select **Properties > Configuration**.
 - c. Click **Select a Data Source**.
 - d. Type the DSN for the Production database, and click **OK**.
 - On Unix, run the `cmsdbsetup.sh` script to change the node's data source to the Production database.
6. On the Test deployment, start the re-pointed Server Intelligence Agent.

Related Topics

- [To back up server configuration settings to a BIAR file](#) on page 81



Life Cycle Management



8

chapter

Many deployments of BusinessObjects Enterprise contain different stages such as a Development, QA, and Production within the same version. Reports and other Business Intelligence objects often require modification or enhancement as a result of changing information needs. Administrators must control how objects are promoted through these stages, whether the objects are completely new or whether they overwrite or update objects that already exist in the destination environment. This is referred to as Life Cycle Management.

An important consideration in Life Cycle Management within the same version, is how the objects will exist in the new environment. Will the promoted objects be completely new objects in the new environment, or will the promoted objects overwrite similarly named objects in the new environment, or will the promoted objects simply update existing objects in the new environment?

In BusinessObjects Enterprise XI 3.x there are new import scenario options, and a feature called Incremental importing, which greatly enhance the administrators choices for content promotion.

Import scenarios

When using the Import Wizard to promote an object from one BusinessObjects Enterprise XI 3.x deployment to another, the wizard allows you use either the objects CUID or its name and path to determine whether the object already exists on the destination environment. It also lets you specify what you want the wizard to do when it finds that an object already exists on the destination environment.

When you are matching objects by CUID, and the Import Wizard finds a matching object on the destination environment, you have three options:

- Update the destination. In case of name conflict, rename the object.

If the Import Wizard finds an object in the destination environment with the same CUID, it updates the destination's object.

If the Import Wizard does not find an object in the destination environment with the same CUID, but it finds an object with the same name, it imports the object from the source environment and then renames that object.

- Update the object. In case of name conflict, do not import it.

If the Import Wizard finds an object in the destination environment with the same CUID, it updates the destination's object.

If the Import Wizard finds an object on the destination environment with the same name but different CUID, it does not import the object from the source environment.

- Do not import the object.

If Import Wizard finds an object on the destination environment with the same CUID, it does not import the object.

If the Import Wizard does not find an object with matching CUID, it imports the source object.

When you are matching objects by name and path, and the Import Wizard finds a matching object on the destination environment, you have three options:

- Keep the destination object and import a renamed copy of the object.

If Import Wizard finds that an object already exists on the destination environment with the same name and path, it imports the source's object and renames it.

- Update the destination object

If Import Wizard finds that an object already exists on the destination environment with the same name and path, it updates the destination environment's version with the source's.

- Do not import the object

If Import Wizard finds that an object already exists on the destination environment with the same name and path, it does not import the source's version.

- Matching objects by name and path is only supported for the following object types:
 - Folders and objects under public folders and personal folders
 - Corporate Categories
 - Personal Categories
 - Universes, Overloads and Connections
 - Dashboards

All other object types will use the matching by unique identifier scheme.

- Matching objects by name and path is not an option when importing content from a BIAR file. When you import from BIAR files, objects will be matched by CUID.

Incremental imports

By default, the Import Wizard automatically imports dependent objects. For example, when you import report objects, the Import Wizard will also import the universes and universe connections that the reports use.

The Incremental import screen allows you to import objects without overwriting dependent objects that already exist on the destination environment. If you want to import report objects without importing a universe or connection that would overwrite a universe or connection on the destination environment, you can specify this on the Incremental import screen.

The Incremental screen gives you the following options:

- Overwrite object contents
- Overwrite universe contents
- Overwrite connection contents
- Overwrite group and user membership
- Overwrite object rights

Note:

Business Objects does not support moving Business Intelligence (BI) content from a recent version of BusinessObjects Enterprise to an earlier version of the same release using BIAR files, the Import Wizard, or any other Business Objects Life Cycle Management (LCM) Tool. For example, reports, documents, and any other content from a BusinessObjects Enterprise XI Release 2 SP3 system cannot be moved to a BusinessObjects Enterprise XI Release 2 SP2 environment.

Promoting report objects

This section describes scenarios for promoting Crystal Report, Web Intelligence, and Desktop Intelligence report objects, and their related universe and universes connection objects, from one BusinessObjects Enterprise XI 3.x deployment to another XI 3.x deployment by using the Import Wizard.

When you use the Import Wizard to import report objects, the wizard automatically imports any universe and universe connections that the reports are dependent on. If you want to import a report object from one environment that uses universes or connections, those universes or connections already exist on the destination environment, and you do not want to overwrite those objects on the destination environment, you must ensure that you chose to not overwrite those objects on the Incremental import screen.

Note:

- If you import a reports without import dependent universes, and those universes do not already exist on the destination environment, the reports will lose the relationship with the universes and will not run properly on the destination environment.
- If you import a report that has rights set on it for users and groups, and you want to import the object rights on the report, you must either import those users and groups or ensure that the users and groups already exist on the destination environment.
- If you are importing a report that relies on a server group or an event that already exists on the destination, do not overwrite the server group or event. On the "Select objects to import" screen, do not select the server group or event.
- If you're importing server groups or events, the Import Wizard does not allow you to import specific objects. You must import all events or server groups, or none of them. If you've modified an event or server group on the source environment, and only want to import that one object, delete the object from the destination environment, and then ensure that you clear the **Overwrite object contents** on the "Incremental import" screen. This ensures that the modified server group or event is the only one that is imported.

If you're importing a modified report that uses a modified event or server group, perform the import in two steps. Delete the event or server group from the destination environment and then import the modified object, making sure that you do not overwrite any objects on the destination environment. Then import the report object, ensuring that you select "Overwrite object contents" on the "Incremental import" screen.

To promote report objects with existing universes

This scenario describes promoting Crystal Report, Desktop Intelligence, or Web Intelligence report objects from one BusinessObjects Enterprise XI 3.x deployment to another XI 3.x deployment, where the report objects use universe and universe connection objects that already exist on the destination environment.

1. Start the Import Wizard, and specify your source and destination environments.
2. On the "Select objects to import" screen, select **Import folders and objects**, and click **Next**.
3. On the "Import Scenarios" screen, select whether you want to use the objects' CUID or name and path to determine whether the objects already exist on the destination environment, and what you want the Import Wizard to do if it finds matching objects, and click **Next**.

If you are promoting a updated version of a report that already exists on the destination environment, select **Use the object's unique identifier to determine whether it already exists in the destination system**, and **Update the destination object. In case of name conflict, rename it.**

4. On the "Incremental import" screen:
 - a. Select **Overwrite object contents**.
 - b. To ensure that you don't overwrite universe and universes connection objects on the destination environment, clear the **Overwrite universe contents** and **Overwrite connection contents** checkboxes.
 - c. If the **Overwrite group and user membership** or **Overwrite object rights** checkboxes appear on the screen, ensure that they are cleared.
 - d. Click **Next** to continue.
5. On the "Folders and objects" screen, select the reports that you want to import.
6. Complete the import process.

The Import Wizard imports the report objects that you select to the destination environment. Because you don't choose to overwrite universe and universe connection objects, the Import Wizard does not touch those objects on the destination environment. The relationship between the report objects and the universes is maintained.

To promote report objects with new business views

This scenario describes promoting a Crystal Report object to a BusinessObjects Enterprise XI 3.x deployment, where the report objects use Business Views that do not already exist on the destination environment.

Note:

When you use the Import Wizard to import report objects that use repository objects such as business views, the Import Wizard does not allow you to choose specific repository objects to import. On the "Import Repository objects options" screen, you can choose one of three options.

- Import all repository objects.
 - Import only repository objects that the selected reports use directly.
 - Import repository objects that the selected reports use directly, as well as any other repository objects they depend on.
1. Start the Import Wizard, and specify your source and destination environments.
 2. On the "Select objects to import" screen, select **Import folders and objects**, and click **Next**.
 3. On the "Import Scenarios" screen, select whether you want to use the objects' CUID or name and path to determine whether the objects already exist on the destination environment, and what you want the Import Wizard to do if it finds matching objects, and click **Next**.
 4. On the "Incremental import" screen:
 - a. Clear **Overwrite object contents**, to ensure that repository objects on the destination environment are not overwritten.
 - b. To ensure that you don't overwrite universe and universes connection objects on the destination environment, clear the **Overwrite universe contents** and **Overwrite connection contents** checkboxes.
 - c. If the **Overwrite group and user membership** or **Overwrite object rights** checkboxes appear on the screen, ensure that they are cleared.
 - d. Click **Next** to continue.
 5. On the "Import Repository objects options" screen, select **Import only repository objects that the selected reports use directly**.
 6. On the "Folders and objects" screen, select the reports that you want to import.
 7. Complete the import process.

To promote report objects with existing business views

This scenario describes promoting a Crystal Report object to a BusinessObjects Enterprise XI 3.x deployment, where the report objects use Business Views that already exist on the destination environment.

If you are importing a business view that already exists on the destination environment, and you choose to overwrite all repositories on the destination environment, you can accidentally overwrite all of the repository objects in the destination environment. To avoid this, first delete the business view from the destination environment. Then, on the "Incremental import" screen, clear the **Overwrite object contents** checkbox. This ensures that the business view that you are importing is added to the destination environment, but that no other repository objects on the destination environment are overwritten.

1. On the destination environment, delete the business view that you want to update.
2. Start the Import Wizard, and specify your source and destination environments.
3. On the "Select objects to import" screen, select **Import folders and objects**, and click **Next**.
4. On the "Import Scenarios" screen, select whether you want to use the objects' CUID or name and path to determine whether the objects already exist on the destination environment, and what you want the Import Wizard to do if it finds matching objects, and click **Next**.
5. On the "Incremental import" screen:
 - a. Clear **Overwrite object contents**, to ensure that repository objects on the destination environment are not overwritten.
 - b. To ensure that you don't overwrite universe and universes connection objects on the destination environment, clear the **Overwrite universe contents** and **Overwrite connection contents** checkboxes.
 - c. If the **Overwrite group and user membership** or **Overwrite object rights** checkboxes appear on the screen, ensure that they are cleared.
 - d. Click **Next** to continue.
6. On the "Import Repository objects options" screen, select **Import only repository objects that the selected reports use directly**.

7. On the "Folders and objects" screen, select the reports that you want to import.
8. Complete the import process.

The Import Wizard imports the business view to the destination environment. Because the business view does not exist on the destination, the business view is imported, even though you choose to not overwrite object contents on the destination. No other repository objects on the destination are touched.

Promoting universes and universe connections

These scenarios describe promoting universe and universe connection objects from one BusinessObjects Enterprise XI 3.x deployment to another XI 3.x deployment.

Note:

When you import universe objects, the Import Wizard automatically imports dependent universe connection objects to the destination environment, unless you choose to not overwrite the universe connections.

To promote universes and universe connections

This scenario describes promoting universe objects from one BusinessObjects Enterprise XI 3.x deployment to another XI 3.x deployment.

By default, the Import Wizard imports any universe connections that the universes that you selected rely on. If you want to promote a universe to the destination, and do not want to overwrite the universe connection on the destination environment, ensure that you clear the **Overwrite connection contents** checkbox on the "Incremental import" screen.

1. Start the Import Wizard, and specify the source and destination environments.
2. On the "Select objects to import" screen, select **Import universes**.
3. On the "Import scenario" screen, specify whether you want to match by CUID or name and path, and what you want the Import Wizard to do if it finds an object that already exists on the destination environment.
4. On the "Increment import" screen:

- a. If you want to update a universe that already exists on the destination environment, select the **Overwrite universe contents** checkbox.
 - b. Specify whether you want to overwrite the universe connections on the destination. If you want to update universe connections that already exist on the destination environment, select the **Overwrite connection contents** checkbox.
 - c. To ensure that you don't overwrite any objects or object rights, clear the **Overwrite object contents** and **Overwrite object rights** checkboxes.
 - d. If the **Overwrite group and user membership** checkbox appears, ensure that it is cleared.
 - e. Click **Next** to continue.
5. On the Import options for universes and connections screen, select **Import all universes and only connection objects used by these universes**.
 6. Complete the import process.

The Import Wizard imports the universes that you selected to the destination environment. If you choose to not overwrite universes connections, the connections that the selected universes rely on are not imported, and the universe connections that exist on the destination environment are not touched. The relationships between the universes and the universe connections are maintained.

Promoting users, groups, and object rights

These scenarios describe promoting users, user groups, and object rights from one BusinessObjects Enterprise XI 3.x deployment to another XI 3.x deployment.

The Import Wizard imports users and groups and their hierarchical relationships. When you import users, you can either add users from the source environment to the groups that exist on the destination environment, or you can overwrite the groups that exist on the destination with the source group.

Note:

When you overwrite the destination environment groups, The Import Wizard deletes any user-to-group relationships that exist on the destination environment but don't exist on the source environment.

If you want to add users from the source to the destination environment, on the "Incremental import" screen, ensure that you clear the **Overwrite group and user membership** checkbox. To replace destination groups with source groups, ensure that you select **Overwrite group and user membership**.

To promote new users and existing groups

This scenario describes the process of promoting new users from a source to a destination environment where those users are in existing groups, and where you don't want to change group membership on the destination environment.

1. Start the Import Wizard, and specify your source and destination environments.
2. On the "Select objects to import" screen, select **Import users and user groups**, and click **Next**.
3. On the "Import Scenarios" screen, specify whether you want to match users by CUID or by name and path and what you want the Import Wizard to do if it finds matching users, and click **Next**.
4. On the "Incremental import" screen:
 - a. Select **Overwrite object contents** and **Overwrite object rights**.
 - b. To ensure that you don't overwrite group membership on the destination environment, clear the **Overwrite group and user membership** checkbox.
 - c. If the **Overwrite universe contents** or **Overwrite connection contents** checkboxes appear, ensure that they are cleared.
 - d. Click **Next** to continue.
5. On the "Users and groups" screen, select the users that you want to import.
6. Complete the import process.

The Import Wizard adds the users that you select to the destination environment. Because you choose to not overwrite groups and user membership, the users and groups that already exist on the destination environment are left untouched.

To promote new groups with existing users

This scenario describes the process of promoting new groups from a source to a destination environment, when you are not promoting new users, and you do not want to change existing user to group membership on the destination environment.

1. Start the Import Wizard, and specify your source and destination environments.
2. On the "Select objects to import" screen, select **Import users and user groups**, and click **Next**.
3. On the "Import Scenarios" screen, specify whether you want to match users by CUID or by name and path and what you want the Import Wizard to do if it finds matching users, and click **Next**.
4. On the "Incremental import" screen:
 - a. Select **Overwrite object contents** and **Overwrite object rights**.
 - b. To ensure that you don't overwrite group membership on the destination environment, clear the **Overwrite group and user membership** check box.
 - c. If the **Overwrite universe contents** or **Overwrite connection contents** checkboxes appear, ensure that they are cleared.
 - d. Click **Next** to continue.
5. On the "Users and groups" screen, select the groups that you want to import.

To select a group without selecting the users in that group, hold the SHIFT key and select the group.
6. Complete the import process.

The Import Wizard adds the groups that you selected to the destination environment. Because you choose to not overwrite groups and user membership, the users and groups that already exist on the destination environment are left untouched.

To promote new object rights for existing users and groups

This scenario describes the process of promoting new object rights that have been modified on a source environment to a destination environment, where you are not promoting new users or groups.

1. Start the Import Wizard, and specify your source and destination environments.
2. On the "Select objects to import" screen, select **Import users and user groups**, and click **Next**.
3. On the "Import Scenarios" screen, specify whether you want to match users by CUID or by name and path and what you want the Import Wizard to do if it finds matching users, and click **Next**.
4. On the "Incremental import" screen:
 - a. Select **Overwrite object rights**.
 - b. To ensure that you don't overwrite objects or group membership on the destination environment, clear the **Overwrite object contents** and **Overwrite group and user membership** check boxes.
 - c. If the **Overwrite universe contents** or **Overwrite connection contents** checkboxes appear, ensure that they are cleared.
 - d. Click **Next** to continue.
5. On the "Users and groups" screen, select the users with the modified rights that you want to import.
6. Complete the import process.

The Import Wizard imports the new rights for the users that you selected. Because you choose to not overwrite object contents or group and user membership, no users, groups, or objects on the destination environment are overwritten.



Get More Help



appendix



Online documentation library

Business Objects offers a full documentation set covering all products and their deployment. The online documentation library has the most up-to-date version of the Business Objects product documentation. You can browse the library contents, do full-text searches, read guides on line, and download PDF versions. The library is updated regularly with new content as it becomes available.

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Index

- .rep files
 - migrating 30
- .ret files
 - and migration 30
- .wid files
 - migrating orphan documents 30
- @Variable('BOPASS') 33
- @Variable('BOUSER') 33

A

- access levels, importing 61
- ACEs
 - on import of universe-related security commands 35
- AD authentication, importing 19
- add-ins
 - migration 31
- Administration Console
 - settings migration 28
- administrators
 - delegated 14
- agnostic documents
 - importing 37
- aliases 19
- application folders and objects, importing 62
- Application Foundation
 - object migration 37
- authentication 19
 - LDAP 19
 - Windows AD 19

B

- backing up
 - server configuration settings 80
- backing up repository 27
- broadcast agent publisher external users and groups, importing 66
- broadcast agent publisher profiles, importing 67
- broadcast agent publisher publications, importing 67
- Business Objects Services Administrator
 - settings migration 28
- business views
 - importing 101, 102
- BusinessObjects
 - migration of document rights 30
- BusinessObjects documents
 - import limitations 31
 - importing 30
 - migrating OLAP data providers 31
 - migration of rights 30
- BusinessObjects SDK
 - Send to BCA 31
 - Send to Inbox 31

C

- Categories folder 32
- categories, importing 61
- CMS 37
- connections
 - BOUSER/BOPASS variables 33
 - how the Import Wizard imports 35
- connections, importing 62

Index

converting
 .rep files to .wid 30
 .rep files to .wqy 30
CSV format 74
CUIDs 35
custom access levels, importing 61

D

database credentials, importing 60
databases
 synchronizing enterprise and database
 credentials 33
 using the DBUSER/DBPASS variables 33
delegated administrators 14
derived universe 35
Designer
 5/6 and XI 3.1 compatibility 35
 and access restrictions in XI 3.1 34
destination environment, and importing 45
document passwords 31
domains
 importing 32
 importing universe domains 35
domains and documents, importing 67

E

events 22
events, updating 71
exporting objects 27

F

folders
 Universe 35
folders, importing 62
free disk space warning 69
FRS
 connection storage 35

G

groups, importing 59

I

Import Groups Option dialog box 60
import scenarios 48, 96
Import Summary 69
Import Wizard
 and third-party documents 37
 how it imports domains 32
 how it imports universe connections 33
 how it imports universes and connections
 35
 limitations 28
 log file 69
 mapping to Inbox and personal files 26
 overview 8
 security migration options 28
 Security Migration Options dialog box 28
 specifying source 40
 specifying source and destination 40, 45
importing
 application folders and objects 62
 Broadcast agent publisher external users
 and groups 66
 broadcast agent publisher profiles 67
 broadcast agent publisher publications 67
 categories 61
 custom access levels 61
 database credentials 60, 74
 domains 32
 domains and documents 67
 folders 20, 62
 group and user membership 56
 groups 19, 74
 importing security 13
 instances 21
 mapping Import Wizard to Inbox and
 personal documents 26
 nodes 80

- importing (*continued*)
 - object rights 56
 - objects 56
 - personal documents and inbox documents 66
 - profiles 65, 74
 - publication recipients 65
 - remote connections and replication jobs 66
 - repository objects 65
 - rights 22
 - security options 58
 - server configuration settings 80
 - specifying source and destination 40, 45
 - text files 74
 - universe folders and universes 64
 - universes and connections 56, 62
 - users and groups 59
 - users with aliases 19
 - users with LDAP authentication 19
 - Web Intelligence documents 68
 - importing business views 101, 102
 - importing object rights 104
 - importing reports 98, 100, 101, 102
 - importing universes 98, 100, 103
 - importing users and groups 104
 - Inbox documents
 - mapping Import Wizard to 26
 - inbox documents, importing 66
 - incremental import 96
 - installation
 - required rights 26
- L**
- life cycle management 15, 96
 - promoting business views 101, 102
 - promoting object rights 104
 - promoting reports 98, 100, 101, 102
 - promoting universes 98, 100
 - promoting universes and universe connections 103
 - promoting users and groups 104
- locale
 - migration of universe 35
- M**
- matching
 - objects, by CUID 48
 - objects, by name and path 48
 - migrating
 - BusinessObjects documents 30
 - connections 33
 - domains 32
 - specifying source and destination 45
 - third-party documents 37
 - migration
 - security migration options 28
- N**
- nodes importing 80
- O**
- object IDs 34
 - object rights
 - importing 104
 - object rights, importing 56
 - objects
 - exporting 27
 - restrictions 34
 - objects, importing 21
 - orphan documents
 - defined 30
 - overwriting
 - group and user membership 56
 - object rights 56
 - objects 12, 48, 56
 - universes connections 56

Index

P

- passwords
 - using the DBUSER/DBPASS variables [33](#)
- performance management repository [37](#)
- Personal Categories folder [32](#)
- personal documents
 - mapping Import Wizard to [26](#)
- personal documents, importing [66](#)
- Platform COM SDK [31](#)
- profiles, importing [65](#)
- promoting business views [101](#), [102](#)
- promoting object rights [104](#)
- promoting reports [98](#), [100](#), [101](#), [102](#)
- promoting universes [98](#), [100](#)
- promoting universes and universe connections [103](#)
- promoting users and groups [104](#)
- publication recipients, importing [65](#)

R

- remote connections, importing [66](#)
- replication jobs, importing [66](#)
- reports
 - importing [98](#), [100](#), [101](#), [102](#)
- reports, importing [21](#)
- repositories
 - backing up [27](#)
 - exporting locally-stored objects [27](#)
- repository objects, importing [65](#)
- restoring
 - server configuration settings [80](#)
- rights
 - importing [22](#)
 - migration of BusinessObjects document rights [30](#)
- row restrictions [34](#)

S

- scheduling [21](#)

- SDK [28](#)

- security
 - migration options [28](#)
 - synchronizing enterprise and database credentials [33](#)
- security commands
 - migration of universe-related [35](#)
- Security Migration Options dialog box [28](#)
- security options, importing [58](#)
- security, importing [13](#)
- server groups, importing from Crystal Enterprise [22](#)
- servers configuration settings, importing [80](#)
- source environment, specifying [40](#), [45](#)
- SQL Server
 - importing connection objects from 5/6 [33](#)
- Supervisor
 - universe access restrictions [34](#)
- synchronizing
 - enterprise and database credentials [33](#)

T

- table mapping [34](#)
- text file delimiter [74](#)
- text file format [74](#)
- text file separator [74](#)
- third-party documents
 - importing [37](#)

U

- universe connections see connections [33](#)
- universe folders and universes, importing [64](#)
- universes
 - exclusive overloads [35](#)
 - how they are imported [35](#)
 - importing [98](#), [100](#)
 - importing associated universes [35](#)
 - modes of import [35](#)
 - overload aggregation [35](#)
 - overload collapsing [35](#)

- universes (*continued*)
 - short name 35
 - the BOUSER/BOPASS variables 33
 - using the DBUSER/DBPASS variables 33
- universes and universe connections
 - importing 103
- universes and universe connections, importing 56
- universes, importing 62
- users and groups
 - importing 104
- users, importing 19, 59

V

- version 5/6
 - Inbox and personal storage 26
- version XI 3.1
 - access restrictions 34

W

- Web Intelligence documents, importing 68
- WebIntelligence
 - migrating orphan documents 30
- WebIntelligence OLAP
 - migration 28

Index