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**User manual BUSINESS OBJECTS BUSINESSOBJECTS XI**  
**User guide BUSINESS OBJECTS BUSINESSOBJECTS XI**  
**Operating instructions BUSINESS OBJECTS BUSINESSOBJECTS XI**  
**Instructions for use BUSINESS OBJECTS BUSINESSOBJECTS XI**  
**Instruction manual BUSINESS OBJECTS BUSINESSOBJECTS XI**

**BusinessObjects 5.x to XI Release 2  
Migration Guide**

BusinessObjects XI Release 2 SP2  
Windows and UNIX



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**Manual abstract:**

All rights reserved. Last update: March 2007 Trademarks Copyright 2 BusinessObjects 5.x to XI Release 2 Migration Guide Contents Chapter 1 Introduction

9 About this guide . . . . .

. . . . .  
. . . . .  
. . . . .

. . . . .  
. . . . .

. . 10 Part I Migration fundamentals Chapter 2 Migration essentials 13 What this guide covers . . .

. . . . .

. . . . .  
. . . . .  
. . . . .

. . . . . 14 What this chapter covers . . .

. . . . .  
. . . . .  
. . . . .

. . . . . 14 Tools to help you migrate . . . . .

. . . . .  
. . . . .  
. . . . .

. . . 14 Migration methods . .

. . . . .  
. . . . .  
. . . . .

. . . . . 17 Basic XI R2 concepts you need to know . . . . .

. . . . .  
. . . . .  
. . . . .

. . 18 Top challenges as you migrate . . . . .

. . . . .  
. . . . .  
. . . . .

. . . . . 20 What migrates (and what doesn't) . . . . .

. . . . .  
. . . . .  
. . . . .

. . . . . 25 Migration phases . . . . .

. . . . .  
. . . . .  
. . . . .

30 Chapter 3 How XI R2 compares with version 5.1.x 35 Where you are now . . .

. . . . .  
. . . . .

. . . . .  
. . . . .  
. . . . .

. . . . . 36 Product offering . . . . .

.....  
.....  
.....  
.....

..... 37 Architecture .

.....  
.....  
.....

.....  
.....  
.....

..... 38 Basic terminology ...

.....  
.....  
.....  
.....

. 41 Installation, configuration, and deployment ....

.....  
.....

..... 45 Security model .....

.....  
.....  
.....

.....  
.....  
.....

. 49 Authentication/authorization .....

.....  
.....  
.....

..... 50 Administration ...

.....  
.....  
.....  
.....

... 52 Reporting, analysis, information sharing ..

.....  
.....

..... 55 SDK .

.....  
.....  
.....

.....  
.....  
.....  
.....

... 59 BusinessObjects 5.1.x to XI Release 2 Migration Guide 3 Contents Part II Understanding what migration entails Chapter 4 Understanding user and group migration 65 Where you are now .....

.....  
.....  
.....

.....	
.....	
... 66 Users, groups, and their organization ..	
.....	
.....	
.....	
.. 66 User/group access rights ...	
.....	
.....	
.....	
..... 69 How users and groups migrate ....	
.....	
.....	
.....	
72 Consequences of importing users and groups .....	
.....	
.....	
.. 74 Delegated Administration .....	
.....	
.....	
.....	
76 Chapter 5 Understanding object migration 79 Where you are now .....	
.....	
.....	
.....	
... 80 What kinds of objects can be imported? ..	
.....	
.....	
.....	
80 Broadcast Agent Scheduler .....	
.....	
.....	
.....	
.. 85 Universes and universe connections ...	
.....	
.....	
.....	
.. 90 Stored procedures ...	
.....	
.....	
.....	
.....	
. 94 Folders, domains, and categories .....	
.....	
.....	
.....	
... 94 Documents .....	
.....	

	.....
	.....
	.....
	.....
	.....
.. 95 Chapter 6 Understanding rights migration	101 Where you are now .....
	.....
	.....
	.....
	.....
..... 102 Security overview .....	
	.....
	.....
	.....
.. 102 Comparison of the security models ...	.....
	.....
	.....
.. 104 Standard migration paths ...	.....
	.....
	.....
..... 109 Special import scenarios .....	
	.....
	.....
	.....
.. 112 Rights by product/component .....	
	.....
	.....
..... 130 Chapter 7 Understanding Import Wizard options	149 Where you are now .....
	.....
	.....
	.....
	.....
... 150 Overview ..	.....
	.....
	.....
	.....
..... 150 Security migration options ..	
	.....
	.....
	.....
	.....
150 The Merge and Update import scenarios .....	
	.....





.....	.....
..... 222 BusinessObjects 5.1.x to XI Release 2 Migration Guide 5 Contents What objects should you migrate? ...	.....
.....	.....
..... 223 Setting up a new folder/group structure ...	.....
.....	.....
... 225 International considerations .....	.....
.....	.....
..... 230 Cleaning up your source environment ..	.....
.....	.....
..... 231 Part IV Importing to the destination environment Chapter 12 Before using the Import Wizard 235 Where you are now ...	.....
.....	.....
.....	.....
... 236 Before installing XI R2 ..	.....
.....	.....
..... 236 Installing XI R2 ..	.....
.....	.....
.....	.....
... 238 Before importing ..	.....
.....	.....
.....	.....
..... 240 Chapter 13 Using the Import Wizard 245 Where you are now ...	.....
.....	.....
.....	.....
..... 246 Overview .	.....
.....	.....
.....	.....
..... 246 Launching the Import Wizard .	.....









1.x is called Business Objects server components. The main functions of the CMS are: . . . Coordinating communication between servers Servers use the CMS to locate the services exposed by other servers. Coordinating communication between the SDK and the backend The SDK uses the CMS to locate the services exposed by servers.

Maintaining the CMS repository (InfoStore) The CMS repository is a database that stores information essential to system operation. For example, the repository keeps track of available documents, maintains security information about users and documents, and know what servers are currently available. Information is stored in the repository as InfoObjects. The main core services the CMS exposes include: . . . InfoStore service (the repository) security and logon service deployment service, which controls plugins name server, which provides a directory of available servers The XI R2 deployment must have at least one CMS running at all times. 18 BusinessObjects 5.1.x to XI Release 2 Migration Guide Migration essentials Basic XI R2 concepts you need to know 3 Repositories Version 5.1.x deployments are based upon a central repository, which is a database stored in a relational database management system. The repository is used to secure access to your data warehouse and provide an infrastructure for distributing information to be shared by users.

This repository database contains the data associated with the security, universe and document domains (universes, documents, etc.). InfoObjects in the CMS In version XI R2, the repository is one of several system databases maintained by the CMS. The CMS repository stores information about the system's operation and administration, but does not store content data such as .wid files. For example, when a document is published to the repository, the meta-data about the document is stored in the CMS repository as an InfoObject, while the document itself (the .wid file) is physically stored, along with its data, in separate storage associated with the File Repository Server (FRS). InfoObjects store information like ID number, InfoObject type, and scheduling information that allows BusinessObjects Enterprise to manage each component. InfoObjects that do not have associated FRS files (that is, InfoObjects that do not represent documents, such as users or groups) contain all the information required to make the managed object functional within the system. BusinessObjects 5.

1.x to XI Release 2 Migration Guide 19 3 Migration essentials Top challenges as you migrate The Central Management Console (CMC) Version 5.1.x relies upon a set of tools that allow you to set up and administer your BI solution, including: . . . Supervisor/Supervisor over the Web for creating the repository and creating users and groups and their access rights the Business Objects Services Administrator for administering and monitoring the cluster and its components the Auditor application for auditing and analyzing system usage Broadcast Agent for the scheduled processing and distribution of documents In XI R2, a centralized web-based administration tool called the Central Management Console (CMC) provides you with a single interface through which you can perform almost every administrative task. Through the CMC, you perform user management tasks such as setting up authentication and adding users and groups.

It allows you to publish, organize, and set security levels for all BusinessObjects Enterprise content, manage server processes and create process groups, and audit activity throughout the system. For more information, see the BusinessObjects Enterprise XI Release 2 Administrator's Guide. Top challenges as you migrate . . . The security model is different The licensing model is different Domains are migrated to a single database Supported deployment configurations are different Post-import verification is required 20 BusinessObjects 5.1.x to XI Release 2 Migration Guide Migration essentials Top challenges as you migrate 3 The security model is different The security model is fundamentally different in function and organization.

In version 5.1.x The security model is user/groupcentric. For example, you select your user/ group and apply a right, such as access to a document. Aggregate and inheritance rights depend on the type of objects. Domains serve as context mechanisms. Documents are published to/stored in domains; you then assign which groups will have access to them. The same is true of universes. In version XI R2 Security is object-centric, based on ACLs. For example, you select an object such as a document or folder, and then grant access to it.

Aggregate and inheritance rights are the same for all objects and are more secured than in 5.1.x. Each domain becomes a folder. Migrated document/universe relationships are still preserved. Documents are also stored in a container (a folder), but you no longer specify security at the time of publishing. You create a folder structure to reflect user/group access: whoever has access to the folder has access to the contents of that folder (inheritance) just like in Windows. The same is true of universes. ACLs The security rules that existed in version 5.1.

x (such as product access, objects rights, and security commands) are enforced in XI R2 by the ACL (Access Control List) mechanism. An ACL is set on an object to define what rights users and groups have on that object, and is composed of a list of ACEs (Access Control Entities), which specify the state of a single right for a single user/group. Right values Rights can only have three values: . . . Unspecified Denied Granted BusinessObjects 5.1.x to XI Release 2 Migration Guide 21 3 Migration essentials Top challenges as you migrate The version 5.

1.x security command value Hidden does not exist and is mapped to the Denied value. Migrated rights If you migrate security along with users/groups and objects, migration is designed to maintain the same level of security between the 5.1.x and the XI R2 CMS repository.

Nonetheless, rights after import may be unexpected, especially after any modification in the CMS, and if you import rights, you will need to check them carefully in the destination environment. Version 5.1.x Supervisor accessed both query databases and the repository using database middleware. In XI R2, Supervisor is replaced by two different tools: . . Designer, which allows you to manage connections and access restrictions, or universe overrides. A restriction can consist of connections, query limit controls, SQL options, object and row restrictions, and/or table mappings. The Central Management Console (CMC), which allows you to manage security on users, groups, folders, connections, universes and documents. For more detailed information on XI R2 rights and migration, see "Understanding rights migration" on page 101.



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Aggregation Aggregation is very different in the new environment. During aggregation, the more restrictive value of an instance is applied.

As a result: · · If you set a right to Denied for a group, even if you set it to Granted for one of its members, the member won't have the right. The only way to get around this restriction is to break inheritance in the CMC. If users belongs to several groups, and if for one group they inherit a Denied value for a right, they will have a Denied value, even if they inherit the Granted value for this right from other groups. For more details, see "Rights aggregation" on page 71. 22 BusinessObjects 5.1.x to XI Release 2 Migration Guide Migration essentials Top challenges as you migrate 3 Specific groups The following groups exist by default in XI R2: · · · · · Profile migration Everyone, which contains all users Administrators Universe Designers Users Report conversion tool Users Administrator Guest The following users exist by default in XI R2: User profiles, used in version 5.1.x to define product access, are no longer used. In XI R2, they are replaced by ACLs for applications, folders, and documents.

If you choose not to migrate security, profiles are not migrated, and therefore, General Supervisors and all other types of administrators are no longer Administrators, unless you manually grant them the necessary rights. If you choose to migrate security: · · · General Supervisors are added to the Everyone, Administrators, and Report Conversion Tool Users groups. By default, they have most but not all rights. Users whose profiles allow them to run Supervisor (Supervisor/ Supervisor-Designer/Versatile with Supervisor access): · have the View access level for the groups to which they belong in version 5.1.x · have the Full-Control access level for the users and subgroups of the groups to which they belong in version 5.1.x Users whose profiles allow them to run Designer (General Supervisor/ Designer/Supervisor-Designer/Versatile with Designer access), on the other hand, are not added to the Universe Designer Users group. In the XI R2 user/group model, when users are imported into multiple groups, multiple instances of the user are not created. The user simply belongs to multiple groups.

Note: For more detailed information about the implications of the Import Wizard's security migration options, see "Security migration options" on page 150. BusinessObjects 5.1.x to XI Release 2 Migration Guide 23 3 Migration essentials Top challenges as you migrate The licensing model is different In XI R2 the product is license model-aware. The license keys issued to you specify the type of license you can use. The product enables users access based on the license and the usage or registered number of users within the repository. For organizations migrating to XI R2 from version 5.1.x, two license models are available: · · Named user licenses are associated with specific users, and allow users to access the system based on their user name and password. Processor licenses are based on the number of processors running version XI R2.

When migrating from 5.1.x to XI R2 you may have a named user license. In this case, the first  $x$  migrated users will be set to Named Users, where:  $x = (\text{Number of users allowed by the named licenses}) - (\text{Number of users already set to Named Users})$  · · If  $x$  is greater than the number of users that must migrate, then all users will be able to login. If  $x$  is less than the number of users to migrate, then the remaining users will not be able to login; these users will not have been set to use a Named User license, and you will not have any other license model to enable these users. You can set the license model explicitly for each user within the CMC. Domains are migrated to a single database In version 5.1.x, domains serve as context mechanisms. For example, simply moving a document from one domain to another can result in the document being run against a production database rather than a test database.

During migration, domains are migrated as folders in the CMS database, with the domain's contents stored in the corresponding folders. Even if the repository is made of several document and universe domains located in different locations, all the domains are migrated as folders in to a single CMS repository database. For more information on what happens to universes when they are migrated, see "Universes and universe connections" on page 90. 24 BusinessObjects 5.1.

x to XI Release 2 Migration Guide Migration essentials What migrates (and what doesn't) 3 Supported deployment configurations are different As the version XI R2 architecture differs from version 5.1.x, the same types of deployment configurations are not necessarily supported in the two environments. Some examples are: · · In 5.1.

x, 2-tier (Desktop) deployments of BusinessObjects don't require a Business Objects server to access the repository. In XI R2 you must go through the CMS server component. In 5.1.x, the various repository domains can be geographically distributed over multiple sites. In XI R2, the repository databases and file systems must be in one location. For more information, see Chapter 9: Understanding deployment configuration migration. Post-import verification is required While importing users/groups and objects from the source deployment using the Import Wizard is simple, Business Objects recommends that you carefully check the objects you have imported for changes that may have occurred during import, and if you have chosen to migrate security, for access right levels in the new environment. Certain documents are automatically updated. · · In general, the older the version of BusinessObjects used to create fullclient documents you are importing, the more extensive the calculation engine changes in the reports in the new environment.

For complete information, see "BusinessObjects document migration" on page 276. During import, all Web Intelligence documents in .wqy format from version 2.x are automatically converted to the version 6.x .wid format. There may be minor changes in the converted documents. For complete information, see "Web Intelligence documents" on page 268. What migrates (and what doesn't) This section provides an overview of: · · Software migration Resource migration For more details, see "Assessing migration by product and functionality" on page 175. BusinessObjects 5.

1.x to XI Release 2 Migration Guide 25 3 Migration essentials What migrates (and what doesn't) Software migration The following table presents the different products and their equivalent in XI R2 after migration. Software Supervisor Requirements Comments Install CMC (Central Management Console), as well as Designer Most Supervisor tasks are carried out by the web-based CMC.



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Designer, however, now allows you to set the following universe-based parameters: connection overloads row restrictions size restrictions Has incorporated some functionality previously included in Supervisor (see previous row in this table). Renamed Desktop Intelligence. Not true for client-server in XI R2. Can install version XI R2 alongside version 5.1.x. You must install a CMS (Central Management Server) on the network for login, even for offline mode. Workgroup mode becomes Standalone mode, in which there is no repository connection and no repository. Install from CD required; no downloading from InfoView. Online and offline modes supported. Designer Update BusinessObjects 2-tier (Desktop) mode Update Install side-by-side + CMS (Central Management Server) install 3-tier mode Update Viewing through InfoView BusinessQuery for Excel Server software (Web Intelligence, InfoView, cluster infrastructure) On Windows On UNIX Update Recreate Recreate Excel worksheets with Live Office. Results may not be identical. Re-install Can install side-by-side on same machine Update Renamed Web Intelligence. WebIntelligence 26 BusinessObjects 5.1.x to XI Release 2 Migration Guide Migration essentials What migrates (and what doesn't) 3 Software InfoView Auditor Requirements Comments Update Recreate Has been redesigned and integrated into the XI R2 framework. XI R2 comes with a special auditing universe and two sets of pre-defined reports (one for Web Intelligence, one for Crystal Reports) for reporting off of the Audit database, in order to report user, document, application, and server event monitoring.

Scheduling capabilities are handled by the CMS. No longer available: Web Intelligence SDK (WIBean/WICOM) Available: BOE SDK (Java and .NET) Report viewer SDKs REBean RENET ASP pages need to be rewritten in ASPX to a new .NET SDK; JSP pages based on WIBean need to be rewritten; JSP pages based on REBean still work in XI R2. Broadcast Agent Developer Suite Update + Recreate Custom applications BusinessObjects 5.1.x to XI Release 2 Migration Guide 27 3 Migration essentials What migrates (and what doesn't) Resource migration Note: Resources exclusive to Crystal Enterprise and BusinessObjects XI are not included in this table. For information on migrating from these two environments, see the BusinessObjects Enterprise Installation Guide. Resources Core repository Security domains Universe domains Document domains Documents BusinessObjects (.rep) VBA add-ins (.rea) Import Wizard Check the calculations in migrated documents. VBA add-ins don't work on the server in XI R2. Instead, you can use embedded VBA macros (except for VBA macros that include calls to the platform such as Login or Logout) to extend Broadcast Agent Scheduler functionality. Import Wizard As .wqy format is no longer supported in BusinessObjects Enterprise XI R2, these files are automatically converted to .wid format during import. Check the calculations in migrated documents. Recreate Using Live Office. Import Wizard These documents, for migrated users only, are migrated into the user's Inbox folder in the CMS. You cannot choose which Inbox documents you migrate, but you can choose to import read and/or Inbox documents and filter them by dates.

Import Wizard Users and groups are migrated as users and groups in the CMS. Import Wizard Universe domains are imported as universe folders in the CMS. Import Wizard Document domains are imported as document folders in the CMS. Migration method Comments Web Intelligence (.wqy) BusinessQuery Inbox 28 BusinessObjects 5.1.x to XI Release 2 Migration Guide Migration essentials What migrates (and what doesn't) 3 Resources Personal Migration method Comments Import Wizard These documents, for migrated users only, are migrated into the user's Favorites folder in the CMS. You cannot choose which personal documents you migrate, but you can choose to import read and/or Inbox documents and filter them by dates. Import Wizard Restrictions are migrated and stored as InfoObjects in the CMS repository. In XI R2 they are called access restrictions (in version 5.

1.x they were called universe overloads), and are set using Designer. Import Wizard Stored procedures are migrated as connection rights. Import Wizard When migrating, Import Wizard automatically: replaces BOUSER and BOPASS with DBUSER and DBPASS in universes proposes the automatic population of these variables for users to migrate Import Wizard A Broadcast Agent job can be migrated from or Recreate BusinessObjects Enterprise 5.1.x to XI R2 only if the scheduler associated to the jobs is supported in XI R2. A job can be imported only if its first action is a Refresh. A job cannot be imported if it has any of the following: · multiple outputs Semantic layer Universes Stored procedures Connections Broadcasting Broadcast Agent Scheduler jobs · · · conditional processing VBA add-ins report bursting ("refresh with the profile of each recipient") saved in XML format BusinessObjects 5.1.x to XI Release 2 Migration Guide 29 3 Migration essentials Migration phases Resources OLAP BusinessObjects OLAP documents Migration method Recreate Comments Depending on your need, recreate using Web Intelligence and OLAP universe; Crystal Reports; or Voyager.

Database migration Migrating to a different repository database The databases supported as repository databases in version 5.1.x may not be supported as CMS databases in version XI R2. Nonetheless, the Import Wizard can import objects from any supported type of source repository database seamlessly into any supported CMS repository database. Migrating query databases All the connectivities supported for versions 5.

1.x are not necessarily supported for version XI R2. Check the list of supported platforms for detailed information. For a constantly updated list of supported platforms and versions, see: [http://support.businessobjects.com/supported\\_platforms\\_xi\\_release2/](http://support.businessobjects.com/supported_platforms_xi_release2/) Migration phases Migration involves the following broad phases, reflected in the organization of this guide: · · · ·

Understanding what migration entails Assessment and planning Importing to the destination environment Post-import checking and tuning For your convenience, throughout this guide, a table at the beginning of each chapter summarizes the overall migration process in numbered steps, and indicates where you are in it. 30 BusinessObjects 5.1.x to XI Release 2 Migration Guide Migration essentials Migration phases 3 The rows in blue are the steps described in the current chapter. Where you are now Step in overall migration process 1. Understanding what migration entails 2. Assessment and planning 3. Preparing for import 4. Importing from the source to destination environment 5. Post-import checking and tuning Understanding what migration entails Before you install BusinessObjects XI R2, you should understand what the migration process entails, how the new environment differs, what happens during migration, and what you should expect once you get there.



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Business Objects highly recommends that you read this chapter, as well as the following chapters carefully: · · For a high-level understanding of how BusinessObjects XI R2 differs from your source environment, read . To understand how different components and characteristics of your Business Intelligence deployment are migrated from one environment to the other, as well as specific migration constraints, read carefully: · "Understanding user and group migration" on page 65 · · "Understanding object migration" on page 79 "Understanding Import Wizard options" on page 149 Assessment and planning Migration assessment and planning means calculating precisely what is required to migrate to the new environment given your particular source deployment, and the parts of it you want to migrate to XI R2. · Familiarize yourself with what migration requires given the version from which you are migrating, and the products/functionality you want to migrate. This chapter also details the differences you can expect in XI R2 for each component you want to migrate. See "Assessing migration by product and functionality" on page 175 BusinessObjects 5.1.x to XI Release 2 Migration Guide 31 3 Migration essentials Migration phases · · Understand the basic deployment configuration rules for XI R2, and what it takes to migrate from your version 5.1.x deployment configuration. See "Understanding deployment configuration migration" on page 167.

Understand how your choice of migration method impacts your migration workflow. In addition, assess your source environment to streamline migration, by calculating the platform and version changes you will need to implement and pinpointing obsolete or unused universes and documents to be excluded from migration, and whether some documents would be more appropriate converted into or re-written in another format available in the destination environment.

See "Planning the migration" on page 205. Importing to the destination environment · Before you use the Import Wizard to import your BI solution to BusinessObjects XI R2, you must perform certain tasks such as: · backing up source content, whether it be stored in the repository, on cluster servers, or locally · setting up the database to be used as a repository in the new environment · if it isn't done already, installing version XI R2 on both client and server machines · starting the required services to get the new system up and running · if you aren't importing for the first time, backing up the destination CMS after each incremental import See "Before using the Import Wizard" on page 235. Full instructions for using the Import Wizard to import your BI content from version 5.

1.x to XI R2 are included in "Using the Import Wizard" on page 245. Post-import checking and tuning This phase includes analyzing the Import Wizard log file to verify the import, then manually checking and if necessary, tweaking, the objects imported into the new environment. This is also when you can transfer or recreate functions or tasks not covered by the Import Wizard, such as reconstructing document schedules, replicating customization, and recreating the precise international environment you require. 32 BusinessObjects 5.

1.x to XI Release 2 Migration Guide Migration essentials Migration phases 3 See "Checking and adapting the new environment" on page 263 and "Checking for calculation updates" on page 275. BusinessObjects 5.1.x to XI Release 2 Migration Guide 33 3 Migration essentials Migration phases 34 BusinessObjects 5.1.x to XI Release 2 Migration Guide How XI R2 compares with version 5.1.x chapter 4 How XI R2 compares with version 5.1.

x Where you are now Where you are now Here is an overview of the migration process, and where you should be now. The topics in blue are described in this chapter. Where you Step in overall migration process are now 1. Understanding what migration entails Product offering (5.1.x vs XI R2) Architecture (5.1.x vs XI R2) Basic terminology (5.1.x vs XI R2) Installation, configuration, and deployment (5.1.x vs XI R2) Security model (5.1.x vs XI R2) Authentication/authorization (5.1.x vs XI R2) Architecture (5.1.x vs XI R2) Reporting, analysis, information sharing (5.1.x vs XI R2) SDK (5.1.x vs XI R2) 2. Assessment and planning 3. Preparing for import 4. Importing from the source to destination environment 5. Post-import checking and tuning 36 BusinessObjects 5.1.x to XI Release 2 Migration Guide How XI R2 compares with version 5.1.x Product offering 4 Product offering The table below lists the applications in each version's offering.

Although the applications in each row belong to the same area of functionality, those in the BusinessObjects 5.1.x column and those in the BusinessObjects XI R2 column are not necessarily equivalent: In BusinessObjects 5.1.x/ WebIntelligence 2.x Designer Supervisor Business Objects Services Administrator BusinessObjects Auditor In BusinessObjects XI R2 Designer Business View Manager Central Management Console Central Configuration Manager Central Management Console Auditing is incorporated in the Central Management Console. It is not strictly equivalent to version 5.1.x Auditor. InfoView Desktop Intelligence Live Office Web Intelligence OLAP Intelligence OLAP Intelligence Designer Broadcast Agent Developer Suite Set Analyzer Central Management Console (CMC) Developer Suite Part of Performance Management Applications (formerly Application Foundation) InfoView BusinessObjects BusinessQuery WebIntelligence Business Objects OLAP Connect BusinessObjects 5.

1.x to XI Release 2 Migration Guide 37 4 How XI R2 compares with version 5.1.x Architecture Architecture This section compares the two systems' server deployment architectures. Business Objects 5.

1.x/WebIntelligence 2.x The distributed WebIntelligence 2.x system is organized into three logical layers: · · The client tier contains products or features that run on the end-user's computer (either as a standalone application or in the web browser). The middle tier contains the HTTP server, the Business Objects components hosted on them (server SDKs, and HSAL), as well as the WebIntelligence backbone, which consists of the CORBA backbone, operating system services, and the processing modules in the WebIntelligence system.

The database tier is made up of the databases containing the data used in documents and reports. · 38 BusinessObjects 5.1.x to XI Release 2 Migration Guide How XI R2 compares with version 5.1.x Architecture 4 BusinessObjects 5.1.x to XI Release 2 Migration Guide 39 4 How XI R2 compares with version 5.1.x Architecture BusinessObjects XI R2 BusinessObjects Enterprise XI R2 is organized into five tiers: · The client tier contains client applications.



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· The application tier includes the web and application servers, as well as the Business Objects components hosted on them. · The intelligence tier manages the XI R2 system, maintaining security information, routing requests to the appropriate processing layer services, managing audit information, and storing report instances for rapid report viewing. · The processing tier accesses the data and generates reports. Transactional workflows are simplified, with each server processing requests for a specific type of object. · The data tier is made up of the databases containing the data used in reports. 40 BusinessObjects 5.1.x to XI Release 2 Migration Guide How XI R2 compares with version 5.1.x Basic terminology 4 Basic terminology Here are some of the main differences in terminology between the two releases: In BusinessObjects 5.

1.x/ WebIntelligence 2.x Repository The BusinessObjects 5.1.x suite uses a repository -- a database that is stored in a relational database management system.

The repository is used to secure access to your data warehouse and to provide an infrastructure for distributing information to be shared by users. The repository database actually contains the data associated with the security, universe, and document domains. Making sure the repository database has enough space is therefore critical. In BusinessObjects XI R2 Central Management Server (CMS) The repository exists here as well, as one of the databases maintained by the Central Management Server (CMS). The CMS is the central service/process in the BusinessObjects Enterprise XI R2 system (see its entry further along in this table).

Although the repository database stores specific information about the objects published to it, including users, servers, security, groups, folders, categories and parameters, it does not actually store physical copies of the objects; it also contains pointers to the physical objects, such as Desktop Intelligence .rep files, Web Intelligence .wid files, Crystal Reports .rpt files, universe files and third-party documents, stored in a file system associated with the File Repository Servers (FRS). When universe and document domains are imported from a version 5.1.x deployment, they are made into folders in the CMS database.

Although the security domain itself is not imported, you can import its contents (user rights, etc.). Servers Processes in the XI R2 system are called servers.

They run as services under Windows, and as processes under UNIX. The CMC's ability to enable/disable and even group servers, for example, concerns processes, not actual Business Objects servers, or server machines. Repository domains The repository must have a security domain. It can also contain universe and document domains. Modules Processes used in Business Objects transactions which can be configured through the Business Objects Services Administrator. They are called modules. BusinessObjects 5.1.x to XI Release 2 Migration Guide 41 4 How XI R2 compares with version 5.1.

x Basic terminology In BusinessObjects 5.1.x/ WebIntelligence 2.x A few examples of modules are: Broadcast Agent Manager (which manages Schedulers) WISStorageManager WIGenerator In BusinessObjects XI R2 The main server in BusinessObjects Enterprise XI R2 is the CMS. Some examples of other servers are: Job Server File Repository Servers Desktop Intelligence Report Server Web Intelligence Report Server Central Management Servers (CMS) The CMS is a single service which provides framework services, security management, administers scheduling tasks, and also is responsible for maintaining the database (CMS database) containing system information, such as users/groups, security levels, and services.

In addition it maintains the repository and audit databases. WebIntelligence server The WebIntelligence backbone is installed on the cluster manager and cluster nodes. This installs all the processing layer modules on the server machines. 42 BusinessObjects 5.1.

x to XI Release 2 Migration Guide How XI R2 compares with version 5.1.x Basic terminology 4 In BusinessObjects 5.1.x/ WebIntelligence 2.x Clusters A cluster is one or more WebIntelligence servers which provide the functional processing for a given distributed deployment. Each server hosts the entire set of WebIntelligence modules, not all of which must necessarily be activated. Some modules run on the cluster manager only. A distributed architecture is one in which common server resources are shared among the server products, and are distributed over several physical servers in a single cluster. Clusters can contain the following elements: The cluster manager serves as the central coordinator amongst all the nodes in the cluster.

There is one and only one cluster manager in a cluster; if the cluster contains only one node, it is the cluster manager. Optional cluster nodes run the ORB components required to communicate with the cluster manager and start WebIntelligence processes. BusinessObjects WebIntelligence Broadcast Agent In BusinessObjects XI R2 CMS clusters A Central Management Server cluster (CMS cluster) consists of two or more CMSs working together to maintain the system databases and repository. The CMSs can be on the same machine or on different ones. This means that at a minimum only the CMS component must be installed and activated on the machine. Other processes (servers) can be installed and run on other machines. A CMS cluster is called an expanded deployment. The distinction between cluster manager and cluster nodes does not apply. When you add a new CMS to a deployment containing a previously-installed CMS, you instruct the new CMS to connect to the existing CMS database and to share the processing workload with any existing CMS machines. By default, the new cluster is given the name of the first installed CMS, prefaced by "@".

Desktop Intelligence Web Intelligence Scheduling functions are handled by the CMS, which instructs the Job Server to process the job on a schedule managed by the CMS. BusinessObjects 5.1.x to XI Release 2 Migration Guide 43 4 How XI R2 compares with version 5.1.

x Basic terminology In BusinessObjects 5.1.x/ WebIntelligence 2.x In BusinessObjects XI R2 WIGenerator and WIQT processes Web Intelligence Report Server The WIGenerator is responsible for generating the HTML for the main pages, such as document and universe lists, and launching WIQT processes.

The WIQT (Query Technique) is an SQL Manager, a Query Executor, a microcube engine, and an HTML document generator.

Corporate document domains Personal document domains File Watcher allows the processing of a scheduled task only when a specified file is present in a specified location. Profiles Supervisor provides several standard profiles, or roles, for the users of Business Objects products. The user profile determines by default what products a user can use: General Supervisor (all products) Supervisor (all products) Designer (all products but Supervisor and Supervisor over the Web) Supervisor-Designer (all products) User (all products but Designer, Supervisor, and Supervisor over the Web) Versatile (configurable) Universe overloads Public folder Favorites folder The Event Server manages file-based events.



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Schedule-based and custom events, on the other hand, are managed by the CMS. Defined in the CMC, profiles let you personalize the scheduled publication of reports for groups of recipients. Users with defined profiles applied to the publication will have the publication personalized for them. In the source environment, this is called report bursting. Universe access restrictions 44 BusinessObjects 5.1.x to XI Release 2 Migration Guide How XI R2 compares with version 5.

1.x Installation, configuration, and deployment 4 Installation, configuration, and deployment Here is an overview of key differences in installation, configuration, and deployment: In BusinessObjects 5.1.x/ WebIntelligence 2.x Server operating systems Version 5.1.x supports heterogeneous clusters, in which cluster servers are hosted on Windows and UNIX machines. In BusinessObjects XI R2 The CMS "servers" in an XI R2 cluster must all be running on machines running the same operating system and version. The other "servers" in the intelligence layer, however, such as the Job Server, can be hosted on machines running completely different (but supported) operating systems. · Initial installation options Desktop Server · Client Server The Server option provides three installation options: · New · Distributed deployments A distributed deployment means that in addition to the cluster manager, at least one cluster node shares the cluster processing.

To distribute processing, you add additional cluster nodes to a cluster. To add a cluster node, you install the Cluster Node installation profile on the node machine. Expand Custom You can distribute a single deployment's transactional capabilities on the same machine by creating multiple instances of a "server", or you can install on additional machines to distribute the load. This capability offers you the ability to scale your system vertically (more services on the same machine) or horizontally (more machines). The CMS does not need to run on each machine.

BusinessObjects 5.1.x to XI Release 2 Migration Guide 45 4 How XI R2 compares with version 5.1.x Installation, configuration, and deployment In BusinessObjects 5.

1.x/ WebIntelligence 2.x Installation and the repository Repository creation is completely independent of the installation of Business Objects software. In BusinessObjects XI R2 Setting up the CMS database, which includes the repository, is an integral part of BusinessObjects Enterprise installation. In a New server installation, if you do not choose to connect the CMS to an existing database, the installation procedure automatically installs and configures MySQL. After installation, you can select or create a new CMS database at any time using the Central Configuration Manager (CCM). Silent installation In version XI R2, your deployment must include a an application server, on which all the web applications' resources are hosted. You must install a Web Component Adapter (WCA) on any machine hosting an application server. The WCA allows your application server to run BusinessObjects Enterprise applications making Crystal Web Requests, and to host the Central Management Console. Not all applications require the WCA.

For example, InfoView doesn't need it unless users will be viewing OLAP Intelligence documents. Installing BusinessObjects Enterprise XI R2 on the same machine as the application server is called a server-side installation. When you perform this installation, the client and server components are installed, the default user and group accounts are created, and the sample reports are published to the system. When the installation is complete, the servers are started as services on the local machine. Command-line installation Application servers BusinessObjects 5.1.x/ WebIntelligence 2.x deployments do not use application servers. 46 BusinessObjects 5.1.

x to XI Release 2 Migration Guide How XI R2 compares with version 5.1.x Installation, configuration, and deployment 4 In BusinessObjects 5.1.x/ WebIntelligence 2.

x Web servers If you are deploying BusinessObjects and Broadcast Agent without WebIntelligence, while you need the WebIntelligence backbone in order to use the CORBA architecture and Windows services, you do not need a web server. In any UNIX-only deployment, however, a web server is required in order to access the Business Objects Services Administrator. You can also administer a UNIX deployment from a Business Objects Services Administrator installed on a PC. When you install WebIntelligence, you must select a web server. You can choose to have the web server configured automatically by the Installer, or to configure it manually.

In BusinessObjects XI R2 If you connect BusinessObjects Enterprise to a web server, the Web Component Adapter (WCA) must be installed on the same machine. For information on deploying web applications on web servers, see "Deploying web applications" on page 48 in this table. License key management During installation, you enter valid license License keys are stored in the CMS database. key strings. You can view your deployment's current license keys, as well as add or delete them, using the CMC. BusinessObjects OLAP Connect You install BusinessObjects OLAP Connect using the standard installation process. Configuring clusters and the ORB By choosing the Cluster Manager or Cluster Node installation profile in the Installer, you choose the ORB setup on the machines. Along with the server products, the Installer installs the OSAgent on the cluster manager, and the OAD on the cluster manager and all cluster nodes. When you install the first Central Management Server (typically a New install), you don't have to define a cluster. In subsequent installs, you are asked if the CMS is part of the cluster, and at that time, the cluster is created.

OLAP Intelligence is installed from the standard installation CD. BusinessObjects 5.1.x to XI Release 2 Migration Guide 47 4 How XI R2 compares with version 5.1.x Installation, configuration, and deployment In BusinessObjects 5.1.x/ WebIntelligence 2.x Available web applications Business Objects Services Administrator · InfoView In BusinessObjects XI R2 · · · · · Central Management Console InfoView Performance Manager applications (formerly Application Foundation), J2EE only Custom web applications developed using the SDK Custom web applications developed using the SDK Deploying web applications In version XI R2, your deployment must include a Web applications are deployed automatically at installation. A web server web server and an application server.

All the web applications' resources are hosted on the is required for all web deployments. application server. If you choose a New installation and are using IIS or Apache/Tomcat, the Business Objects web applications are deployed automatically on the application server, unless you are deploying to an existing Java application server.



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Otherwise, you must deploy web applications manually. For information, see the BusinessObjects XI Release 2 Installation Guide.

Repository creation You create the repository after installation, using the Supervisor application. After repository creation, for distributed deployments, you must copy the bomain.key file corresponding to the repository on each node in the cluster. For Desktop deployments, you must copy the .key file to a shared point of access on the network, or to each client machine.

If you do not have a supported database client on the machine, installation can install and configure MySQL for use as the CMS database. To use your own database server, you must create a new, empty database on your database server prior to running the installation. This database will be configured during the install. Whenever you add a new CMS to a cluster in an Expand installation, you define the connection to the initial CMS's database. This allows the server to connect to it. 48 BusinessObjects 5.1.x to XI Release 2 Migration Guide How XI R2 compares with version 5.1.x Security model 4 In BusinessObjects 5.

1.x/ WebIntelligence 2.x Multiple service instances Multiple instances of WIQT and BusObj.exe (Windows) / bolight (UNIX) processes can run concurrently on the same server. In BusinessObjects XI R2 Multiple instances of the same service can run on the same machine (providing vertical scaling), or on separate machines (for horizontal scaling), in any mixture of supported operating systems. The single exception is the Central Management Server, which must run on the same operating system within a single cluster. Unicode databases The use of Unicode databases, which can All CMS databases must support the Unicode protocol. store information in different languages and centralize all the information in a company, is supported neither as a data source for reports, nor as a repository. Security model BusinessObjects 5.1.

x applications use a very different security model than that provided with BusinessObjects Enterprise XI R2, and as such, administrators of BusinessObjects 5.1.x systems are encouraged to read "Understanding rights migration" on page 101 with attention. BusinessObjects 5.1.

x to XI Release 2 Migration Guide 49 4 How XI R2 compares with version 5.1.x Authentication/authorization Authentication/authorization For BusinessObjects 5.1.x, authentication is defined for an entire cluster and/ or all desktop users.

In version XI R2, security is much more granular. You implement an authentication method for each user when you create the user's account. When users log into the system, they specify their username and password, but may enter their authentication method as well. In BusinessObjects 5.1.x/ WebIntelligence 2.x In BusinessObjects XI R2 bomain.key The bomain.key file tells Business Objects There is no bomain.key file.

At login, the CMS applications where to find the repository's verifies the user name and password against the security domain. security information stored in the CMS database. Each CMS is configured either at installation or subsequently using the Central Management Console (CMC) to connect to a specific database. Setting the authentication and authorization methods You set the authentication/authorization for the entire cluster using the Business Objects Services Administrator. You set authentication for 2-tier deployments of BusinessObjects in Supervisor. You select the authentication method for each user at the creation of the user's account, using the CMC. You can even assign multiple aliases, or authentication modes, to a single user, or create new aliases then assign them to exiting users in the system. If you import external users via LDAP, Windows NT or ActiveDirectory, users are automatically created. So if you are not using complex scenarios in which users can log on with both NT and LDAP authentications, you don't need to create the settings for each user individually. 50 BusinessObjects 5.

1.x to XI Release 2 Migration Guide How XI R2 compares with version 5.1.x Authentication/authorization 4 In BusinessObjects 5.1.

x/ WebIntelligence 2.x Available authentication modes These options may differ according to the version of your source software. · NT Challenge / Response

In BusinessObjects XI R2 · · Windows NT authentication Enterprise authentication (automatically enabled when you install the system, and similar to Business Objects standard in version 5.x) LDAP authentication Windows AD authentication · · Basic authentication (user authentication is delegated to the web server) Business Objects standard No authentication · · Other authentication modes are available through add-in products, such as SAP authentication.

Single Sign-On is not a mode in itself, but is available for certain authentication modes.

See below. Single Sign-On to BusinessObjects Enterprise can be provided through the use of third-party systems such as Windows AD or Netegrity SiteMinder. End-to-end single sign-on includes SSO to the database at the back-end. Note: If you use SiteMinder, you must use LDAP for external user management. Because of the use of Access Control Lists (ACL), an industry standard method of controlling cascading security access, the imposition of restrictions is much more granular. You can apply user, group, and role level security at the object level, to documents, categories, folders, universes, and connections. This means, for example, that you could allow a group to refresh document A, but not refresh document B. Single-Sign-On (SSO) SSO is not available as an authentication mechanism. Authorization You can use security commands in Supervisor to restrict user and group access to functionalities in Business Objects products. You cannot restrict access at the object level.

For example, if you grant a group the right to refresh, but not create documents, the restriction will apply regardless of the documents being used.

BusinessObjects 5.1.x to XI Release 2 Migration Guide 51 4 How XI R2 compares with version 5.1.x Administration Administration The administrative model applied to BusinessObjects Enterprise XI R2 is very different from the BusinessObjects 5.1.x model. · The Central Management Console (CMC) The CMC allows you to perform user management tasks such as setting up authentication and adding users and groups. It also allows you to publish, organize, and set security levels for all of your BusinessObjects Enterprise content.

Additionally, the CMC enables you to manage servers and create server groups, whenever the Central Management Server (CMS) is running. · The Central Configuration Manager (CCM) The CCM is a server-management tool that allows you to view and configure each of your BusinessObjects Enterprise server components while Business Objects servers are offline. This tool allows you to start, stop, enable, and disable Business Objects servers, as well as view and configure advanced server settings.



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