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**User manual BUSINESS OBJECTS ENTERPRISE XI 3.1**  
**User guide BUSINESS OBJECTS ENTERPRISE XI 3.1**  
**Operating instructions BUSINESS OBJECTS ENTERPRISE XI 3.1**  
**Instructions for use BUSINESS OBJECTS ENTERPRISE XI 3.1**  
**Instruction manual BUSINESS OBJECTS ENTERPRISE XI 3.1**

BusinessObjects Enterprise XI 3.1  
Import Wizard Guide

BusinessObjects Enterprise XI 3.1



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**Manual abstract:**

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*1 Import Wizard Guide Getting Started 1 1 Getting Started 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. 2. 3.*

*4. Specifying the source environment. Specifying the destination environment. Selecting the types of objects to import. Selecting an Import Scenario, which determines whether to merge or update the objects that you import. 8 BusinessObjects Enterprise XI 3.*



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1 Import Wizard Guide Getting Started 1 5. Selecting the specific objects to import. BusinessObjects Enterprise XI 3.1 Importscenario 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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 13 2 Import Wizard concepts Delegated administration 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. 14 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Import Wizard concepts Life cycle management 2 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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 15 2 Import Wizard concepts Life cycle management 16 BusinessObjects Enterprise XI 3.

1 Import Wizard Guide Importing information From Crystal Enterprise or BusinessObjects Enterprise 3 3 Importing information From Crystal Enterprise or BusinessObjects Enterprise What kinds of objects can be imported? 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. 18 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing information From Crystal Enterprise or BusinessObjects Enterprise Importing users and groups 3 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.



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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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 19 3 Importing information From Crystal Enterprise or BusinessObjects Enterprise Importing folders 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. 20 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing information From Crystal Enterprise or BusinessObjects Enterprise Importing report objects 3 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. BusinessObjects Enterprise XI 3.1 Import Wizard Guide 21 3 Importing information From Crystal Enterprise or BusinessObjects Enterprise Importing rights 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.



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You can also manually add servers to the imported group in the Central Management Console (CMC). 22 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing information From Crystal Enterprise or BusinessObjects Enterprise Importing events, servers, and server groups 3 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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 23 3 Importing information From Crystal Enterprise or BusinessObjects Enterprise Importing events, servers, and server groups 24 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing Information From BusinessObjects 5.x or 6.

x 4 4 Importing Information From BusinessObjects 5.x or 6.x Before importing from BusinessObjects Enterprise 5.x/6.x 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\ocData 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\<nodename>\<clustername>\ocdata for access to 6.x .key files

\$INSTALLDIR\nodes\<nodename>\<clustername>\storage\user if you are importing personal documents and categories 26 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x 4 ·

\$INSTALLDIR\nodes\<nodename>\<clustername>\storage\mail if you are importing the read content of users' Inbox folders 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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 27 4 Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x · · · · · 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.



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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.

28 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.

x 4 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 All Desktop Intelligence rights All Web Intelligence rights All Designer rights No Access Not specified Not specified Not specified BusinessObjects Enterprise XI 3.1 Import Wizard Guide 29 4 Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.

x/6.x 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 30 BusinessObjects Enterprise XI 3.

1 Import Wizard Guide Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x 4 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). BusinessObjects Enterprise XI 3.1 Import Wizard Guide 31 4 Importing Information From BusinessObjects 5.

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

I , 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.



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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 32 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x 4 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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 33 4 Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x 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. 34 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x 4 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.

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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 35 4 Importing Information From BusinessObjects 5.x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x · · · · 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 Imports all universes and all connection Import all universes and all connection objects.



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You cannot select individual objects universes or connections. Import all universes and only connection objects used by these universes. Imports all universes and connections used by the selected documents. This that the selected Web Intelligence and option also enables you to select addiBusinessObjects documents use directional 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 36

BusinessObjects Enterprise XI 3.1 Import Wizard Guide Importing Information From BusinessObjects 5.

x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x 4 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.

I 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. BusinessObjects Enterprise XI 3.1 Import Wizard Guide 37 4 Importing Information From BusinessObjects 5.

x or 6.x Importing objects from BusinessObjects Enterprise 5.x/6.x 38 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Using the Import Wizard 5 5 Using the Import Wizard Specifying the source environment 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. 2. 3. 4. Specifying the source environment. Specifying the destination environment. Selecting the types of objects to import. 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. 40 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Using the Import Wizard Specifying the source environment 5 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.

BusinessObjects Enterprise XI 3.1 Import Wizard Guide 41 5 Using the Import Wizard Specifying the source environment 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. 42 BusinessObjects Enterprise XI 3.

I Import Wizard Guide Using the Import Wizard Specifying the source environment 5 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.



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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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 43 5 Using the Import Wizard Specifying the source environment 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 44 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Using the Import Wizard Specifying the destination environment 5 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. BusinessObjects Enterprise XI 3.1 Import Wizard Guide 45 5 Using the Import Wizard Specifying the 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. 46 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Using the Import Wizard Selecting objects to import 5 · 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.

BusinessObjects Enterprise XI 3.1 Import Wizard Guide 47 5 Using the Import Wizard Selecting an import scenario 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.

BusinessObjects Enterprise XI 3.1 Import Wizard Guide 47 5 Using the Import Wizard Selecting an import scenario 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.



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48 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Using the Import Wizard Selecting an import scenario 5 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.  
BusinessObjects Enterprise XI 3.

1 Import Wizard Guide 49 5 Using the Import Wizard Selecting an import scenario 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 If the Import Wizard finds an object in the destination environment with the same CUID, it updates the destination's object. Update the destination object. In case of name conflict, rename it. 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. If the Import Wizard finds an object in the destination environment with the same CUID, it updates the destination's object. Update the destination object. In case of name conflict, do not import If the Import Wizard finds an object it. on the destination environment with the same name but different CUID, it does not import the object from the source environment.

If Import Wizard finds an object on the destination environment with the same CUID, it does not import the object. Do not import the object. 50

BusinessObjects Enterprise XI 3.1 Import Wizard Guide Using the Import Wizard Selecting an import scenario 5 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 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 port a renamed copy of the object. and renames it. After the import, both the destination's original and the source's versions are on the destination. 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. 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.

Update the destination object. Do not import the object. 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 BusinessObjects Enterprise XI 3.1 Import Wizard Guide 51 5 Using the Import Wizard Selecting an import scenario · · 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.  
52 BusinessObjects Enterprise XI 3.

1 Import Wizard Guide Using the Import Wizard Selecting an import scenario 5 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. BusinessObjects Enterprise XI 3.1 Import Wizard Guide 53 5 Using the Import Wizard Selecting an import scenario Action Description I want to merge the source system into the destination system 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. If the Import Wizard finds top-level folders with the same name and path on both the source and destination Automatically rename top-level fold- environments, the Wizard renames ers that match top-level folders on and imports the source folders. the destination system. If you do not choose this option, the Import Wizard does not update matching top-level folders.

The Import Wizard uses an object's CUID to determine if the source object already exists on the destination environment. All of the selected obI want to update the destination sys- jects from the source are added to tem by using the source system as the destination, but if the source oba reference. ject 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. 54 BusinessObjects Enterprise XI 3.1 Import Wizard Guide Using the Import Wizard Selecting an import scenario 5 Action Description Automatically rename objects if an object with that title already exists in If you do not choose this option, the the destination folder.

Import Wizard does not import the object. The Import Wizard renames objects from the source that have the same name and path but a different CUID. Note: · If you choose to update the destination system by CUID, you can choose incremental import options on the next screen.



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