Information Builders

WebFOCUS

Migration
Release 8.2 Version 04

Contents

Preface

This manual describes the tools for migrating from WebFOCUS 7.x releases, such as WebFOCUS 7.1.x, WebFOCUS 7.6.x, and WebFOCUS 7.7.x, to WebFOCUS 8.2 Version 04. It is intended for developers and WebFOCUS administrators.

How This Manual Is Organized

This manual includes the following chapters:

	Chapter/Appendix	Contents
1	Migrating Content	Describes the tools available to migrate content, including Managed Reporting security information, application content, ReportCaster content, and Mobile Favorites content.
A	Glossary	Defines key terms and concepts in this manual.

Conventions

The following table describes the conventions that are used in this manual.

Convention	Description
THIS TYPEFACE or this typeface	Denotes syntax that you must enter exactly as shown.
this typeface	Represents a placeholder (or variable) in syntax for a value that you or the system must supply.
<u>underscore</u>	Indicates a default setting.
this typeface	Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices. Type one of them, not the braces.

Convention	Description
[ ]	Indicates a group of optional parameters. None are required, but you may select one of them. Type only the parameter in the brackets, not the brackets.
|	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
. . .	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).
. . .	Indicates that there are (or could be) intervening or additional commands.

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Information You Should Have

To help our consultants answer your questions effectively, be prepared to provide the following information when you call:

❏ Your six-digit site code (*xxxx.xx*).

❏ Your WebFOCUS configuration:

　❏ The front-end software you are using, including vendor and release.

　❏ The communications protocol (for example, TCP/IP or HLLAPI), including vendor and release.

　❏ The software release.

　❏ Your server version and release. You can find this information using the Version option in the Web Console.

❏ The stored procedure (preferably with line numbers) or SQL statements being used in server access.

❏ The Master File and Access File.

❏ The exact nature of the problem:

　❏ Are the results or the format incorrect? Are the text or calculations missing or misplaced?

　❏ Provide the error message and return code, if applicable.

　❏ Is this related to any other problem?

❏ Has the procedure or query ever worked in its present form? Has it been changed recently? How often does the problem occur?

❏ What release of the operating system are you using? Has it, your security system, communications protocol, or front-end software changed?

❑ Is this problem reproducible? If so, how?

❑ Have you tried to reproduce your problem in the simplest form possible? For example, if you are having problems joining two data sources, have you tried executing a query containing just the code to access the data source?

❑ Do you have a trace file?

❑ How is the problem affecting your business? Is it halting development or production? Do you just have questions about functionality or documentation?

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Migrating Content

WebFOCUS tools allow you to migrate Managed Reporting security information, and application content. ReportCaster systems based on WebFOCUS 7.x and higher can also be migrated.

The migration process consists of two parts, export and import. An export utility extracts data from WebFOCUS 7.x environments. On Windows, a .bat file is used to export the content. On UNIX or Linux, a corresponding .sh script is used.

The data is extracted into a file structure consisting of XML files and folders. This extract structure is used for the import. The import process reads the extracted file structure and imports the content into the WebFOCUS 8.2 Version 04 environment.

The same domains, users, and groups that are available in the WebFOCUS 7.x environment exist in the WebFOCUS 8.2 Version 04 environment after a successful import.

In this chapter:

❏ WebFOCUS Version Definitions

❏ Export and Import Encoding

❏ Migration Functionality and User Default Roles (UDR)

❏ Domain and Managed Reporting Item Properties

❏ Migrating WebFOCUS Content

WebFOCUS Version Definitions

The following releases are referenced throughout the migration topics:

❏ **WebFOCUS 7.x**. Refers to WebFOCUS 7 releases such as 7.1.x, 7.6.x, and 7.7.x. In these references, the *x* is a variable, for the specific version of WebFOCUS 7 from which you are migrating.

❏ **WebFOCUS 7.1.x, 7.6.x, 7.7.x**. Refers to the WebFOCUS 7 releases within the WebFOCUS 7.1 release, WebFOCUS 7.6 release, and WebFOCUS 7.7 release. In these references, the *x* is a variable for a specific version of each release, such as WebFOCUS 7.7.03.

❑ **WebFOCUS 8**. Refers to all WebFOCUS releases 8.0 and higher. In context, this reference is used to highlight architectural changes that were made since WebFOCUS 7, and are applicable to WebFOCUS 8.0.x, 8.1.x, 8.2.01M, 8.2.02, 8.2.03, 8.2.04 and higher releases.

Export and Import Encoding

During the export and import steps, the content exported or imported is encoded based on the Java character ENCODING value. The default value is UTF8. For WebFOCUS environments configured for National Language Support, the encoding value may need to be edited prior to starting the migration process. Failure to provide the correct encoding value may result in corrupt exported content or repository content.

The export Java character ENCODING value is configured based on the source WebFOCUS environment client code page and platform.

The import Java character ENCODING value is configured based on the target environment client code page and platform. The default ENCODING value is UTF8.

The following table lists the client code pages and respective ENCODING values for each platform.

IBI Client Code Page	Windows	AIX/AS400	UNIX (Other)	z/OS
437	UTF8	UTF8	UTF8	N/A
137	Cp1252	Cp1252/ISO8859_1	Cp1252/ISO8859_1	N/A
874	MS874	Cp874	Cp874	N/A
942	MS932	Cp943C	MS932	N/A
946	MS936	GBK	GBK	N/A
949	MS949	Cp970	MS949	N/A
10942	EUC_JP	Cp33722C	EUC_JP	N/A
10948	MS950	Cp950/X-IBM950	MS950	N/A
1250	Cp1250	Cp1250	Cp1250	N/A
1251	Cp1251	Cp1251	Cp1251	N/A

IBI Client Code Page	Windows	AIX/AS400	UNIX (Other)	z/OS
1252	Cp1252	Cp1252	Cp1252	N/A
1253	Cp1253	Cp1253	Cp1253	N/A
1254	Cp1254	Cp1254	Cp1254	N/A
1255	Cp1255	Cp1255	Cp1255	N/A
65001	UTF8	UTF8	UTF8	N/A
1047	N/A	N/A	N/A	Cp1047

Note: Contact Customer Support Services if you are using an import ENCODING value different from the default UTF8 value due to a different database collation.

Migration Functionality and User Default Roles (UDR)

In WebFOCUS 7.x releases such as WebFOCUS 7.1, WebFOCUS 7.6, or WebFOCUS 7.7, users are assigned a specific role and placed in a group or multiple groups. These groups are assigned to a domain or multiple domains. The effect of this feature is that users created in these releases have a single role throughout the entire repository and all the domains to which they have access.

An exception to this feature is when you give a user a Developer role, deselect *Developer in all assigned Domains*, and select a specific domain or domains in which the user is a Developer. This user is automatically assigned an Analytical User role for all the domains assigned and a Developer role in the specified Developer domains.

As of WebFOCUS 8, user abilities are determined by rules based on groups, rather than user roles. The migration process maps WebFOCUS 7.x user roles to WebFOCUS User Default Roles (UDRs), which are implemented through rules associated with the groups and domains to which a user has access. It is important to understand this concept and how it works to effectively support and administer a migrated WebFOCUS 8.2 Version 04 environment.

Additionally, in WebFOCUS 7.x releases, roles are assigned a base MRFLAG. Usually, there is a single mapping of a role to a base MRFLAG. However, the Power User and Run Only User are based on the Analytical User role and both map to the same base MRFLAG of *auser*. The Content Manager is based on the Developer role and maps to the *domadmin* MRFLAG. If a Developer is assigned to administer certain domains, the MRFLAG of dadomains=*domainHREF* is assigned, and the Developer is considered an Analytical User role in all the other domains to which they are assigned. These Developers could also be selected as Group Administrators, and are then assigned the additional flag of gagroups=#*groupHREF*.

WebFOCUS 8 User Default Roles map to the base privileges created by the WebFOCUS 7.x role. For example, all Run Only Users and Power Users now migrate to the UDR of WF_Role_AnalyticalUser, with additional privileges either selected or deselected.

WebFOCUS 7.x Role	WebFOCUS 8 UDR
User	WF_Role_User
Run Only User	WF_Role_AnalyticalUser
Analytical User	WF_Role_AnalyticalUser, WF_Privilege_SaveMyContent
Power User	WF_Role_AnalyticalUser, WF_Privilege_SaveMyContent, WF_Privilege_Advanced, WF_Privilege_Share
Developer	WF_Role_Developer, WF_Privilege_SaveMyContent
Content Manager	WF_Role_Developer, WF_Privilege_SaveMyContent, WF_Privilege_DataServer, WF_Privilege_Share, WF_Privilege_Advanced
Managed Reporting Administrator	WF_Role_MRAdmin
Library Only User	WF_Privilege_Library

During the migration process, two different types of groups are created in WebFOCUS 8.2 Version 04, along with their associated rules:

❏ Groups associated with the WebFOCUS 7 groups.

Rules are created for these groups in the form of:

```
GROUPn PERMIT UDR on Domainx FOLDER_AND_CHILDREN
```

```
GROUPn DENY UpdateResource on Domainx FOLDER_ONLY
```

❏ Special groups created for certain privileges, such as MRAdmin, rcadmin, schedules, and library.

The names, rules, and folders of the migrated privileges are:

Name	Rules	Migrated Folder
MRAdmin_privilege	PERMIT SystemUserDefaultRole	IBFS:/WFC
	PERMIT SystemUserDefaultRole	IBFS:/SSYS
	PERMIT SystemFullControl	IBFS:/EDA
RCAdmin_privilege	PERMIT WF_Privilege_RCadmin_utilities	IBFS:/WFC/Repository
	PERMIT WF_Privilege_RCadminGroup	IBFS:/SSYS/GROUPS
Schedule_privilege	PERMIT WF_Privilege_Schedule	IBFS:/WFC/Repository/ReportCaster
	PERMIT List	IBFS:/WFC/Repository/ReportCaster
Library_privilege	PERMIT WF_Privilege_Library	IBFS:/WFC/Repository/Library_Content
	PERMIT List	IBFS:/WFC/Repository/Library_Content
DataServer_privilege	PERMIT SystemFullControl	IBFS:/EDA

Note: Rules are created for these groups on the /WFC/Repository.

The built-in UDRs that exist in WebFOCUS 8 are similar to the legacy WebFOCUS 7 roles and privileges.

Roles

WF_Role_AnalyticalUser

WF_Role_ContentManager (not used for migration)

WF_Role_Developer

WF_Role_MRAdmin

WF_Role_MRGrpAuthMgr

WF_Role_MRNoPrivs

WF_Role_MRSecObjMgr

WF_Role_PowerUser (not used for migration)

WF_Role_RunOnlyUser (not used for migration)

WF_Role_User

Privileges

WF_Privilege_Advanced

WF_Privilege_DataServer

WF_Privilege_Library

WF_Privilege_ParmReport

WF_Privilege_RCadmin_utilities

WF_Privilege_RCadminGroup

WF_Privilege_SaveMyContent

WF_Privilege_Schedule

WF_Privilege_Share

Note: In WebFOCUS 7.x releases, Run Only Users with the saveparmreport privilege can save parameterized reports, but cannot save reports created from a Reporting Object using InfoAssist. In WebFOCUS 8.2 Version 04, the equivalent WF_Role_AnalyticalUser UDR can save both parameterized reports and can save reports created from a Reporting Object using InfoAssist.

During the migration process, the following takes place:

❏ Top-level folders (or Domains) are created.

❏ Standard Report content is created.

❏ Private user content is created (My Reports and Custom Reports).

❏ Users are created in the repository.

   ❏ Passwords are maintained, but are now stored in a SHA-1 salted hash format for improved security.

   ❏ Users are assigned a User Default Role, consisting of the original role with optional flags.

❏ Groups are created for the current WebFOCUS 7.x groups. The new names are the original internal reference, and the new description is the prior description with the word *Migrated* prefaced to the group.

❏ Rules are created for these groups to implement User Default Roles.

The following is an example of the types of rules that are created for the Sales Group to allow access to the Stores and Vendors folder in WebFOCUS 8.2 Version 04.

❏ Rules 1 and 3 are conventional rules, protecting the top-level folder from deletion or modification.

❏ Rules 2 and 4 are the rules that implement a UDR on those particular folders.

Rules Created for the Sales Group

#	Group	Verb	Role	Resource	Apply_To
1	Sales	DENY	UpdateResource	/WFC/Repository/Stores	FOLDER_ONLY
2	Sales	PERMIT	SystemUserDefaultRole	/WFC/Repository/Stores	FOLDER_AND_CHILDREN
3	Sales	DENY	UpdateResource	/WFC/Repository/Vendors	FOLDER_ONLY
4	Sales	PERMIT	SystemUserDefaultRole	/WFC/Repository/Vendors	FOLDER_AND_CHILDREN

Migrating a Developer in a Single Domain

The following example of a user created in a WebFOCUS 7.x release is given a Developer Role, assigned to the Sales Group, and only allowed to be a Developer in a single Domain.

In WebFOCUS 7.x releases, the user was:

❏ Given the Developer role.

❏ Assigned to the Sales group. The sales group is associated with the Stores, Vendors, and HR domains.

❏ Assigned only the Stores Domain as a Developer.

After migration to WebFOCUS 8.2 Version 04, the user is:

❏ Assigned the User Default Role of WF_Role_AnalyticalUser, which governs the capabilities for all access by default.

❑ Assigned to the Sales group. The Sales group is permitted List and UDR roles on all the folders, which were previously the domains.

❑ Assigned a rule granting the Developer role on the one folder for which there are higher privileges.

These rules are shown below:

Group Rules

#	Group	Verb	Role	Resource	Apply_To
1	Sales	DENY	UpdateResource	/WFC/Repository/ Stores	FOLDER_ONLY
2	Sales	PERMIT	SystemUserDefaultRole	/WFC/Repository/ Stores	FOLDER_AND_CHILDREN
3	Sales	DENY	UpdateResource	/WFC/Repository/ Vendors	FOLDER_ONLY
4	Sales	PERMIT	SystemUserDefaultRole	/WFC/Repository/ Vendors	FOLDER_AND_CHILDREN
5	Sales	DENY	UpdateResource	/WFC/Repository/HR	FOLDER_ONLY
6	Sales	PERMIT	SystemUserDefaultRole	/WFC/Repository/HR	FOLDER_AND_CHILDREN

User Rules

#	User	Verb	Role	Resource	Apply_To
1	User	PERMIT	WF_Role_Developer	/WFC/Repository/Stores	FOLDER_AND_CHILDREN

Domain and Managed Reporting Item Properties

The following legacy Managed Reporting property is not available in WebFOCUS 8.2 or WebFOCUS 8.2 Version 04. It was applicable in WebFOCUS 7.1.x, 7.6.x, and 7.7.x releases. This topic provides information on how to identify whether the property flag is selected in the WebFOCUS 7.x release and how to define rules in WebFOCUS 8.2 Version 04 to implement the same restriction.

Standard Report or Other File Property (MRFLAG value *restrictdev*)

❏ The purpose of this property in WebFOCUS 7.x releases is to allow Managed Reporting Administrators to deny the Developer role the ability to delete, change, or make application content (FEX and HTM) stored within a domain available or unavailable to end users.

❏ In WebFOCUS 8.2 Version 04, this is accomplished by creating a role, such as Restrict_Developer_Access, with the following privileges:

  ❏ Delete

  ❏ Create Item or Folder

  ❏ Edit Item or Folder

  ❏ Publish

  ❏ Unpublish

Then create a rule using the role (Restrict_Developer_Access) to deny the privileges included in the role.

❏ To create the rule for all items within a folder, right-click the folder, select *Security*, then *Rules*, and create the following rule.

Name	Access	Apply to
Restrict_Developer_Access	Denied	This folder only

❏ To create the rule for a specific item within a folder, right-click the item, select *Security*, then *Rules*, and create the following rule.

Name	Access	Apply to
Restrict_Developer_Access	Denied	This folder only

Procedure: **How to Assess Applied Property in WebFOCUS 7 (MR Item Property – Restrict Developer Access)**

The steps to identify Managed Reporting items that have the *Restrict Developer Access* property selected are the same for an Internal MR Repository (/basedir) or MR Realm driver configuration.

1. Run the MR Extract Utility. For more information, see the *Managed Reporting Administrator's Manual*.

2. Open the IBIMRDMC.TXT and IBIMRDOM.TXT files, located in the WF Client utilities directory, in an editor. The IBIMRDMC.TXT file contains information for the items stored in the domains. The IBIMRDOM.TXT file contains domain information.

3. Search for the string restrictdev that identifies items that have the Restrict Developer Access property selected. For example, the string restrictdev is in the following entry for the Product Cost, Price & Profit report (app/product_cost_price_profit.fex) located in corporat/corporat.htm domain.

```
"corporat/corporat.htm","STDRPT","ITEM","app/
product_cost_price_profit.fex",
"Product Cost, Price & Profit","",runasolap,rassist,
createdon=1289568408977,createdby=Default+Administrator+%28admin%29,
lastmodby=Default+Administrator+%28admin%29,restrictdev","#inventorydat"
```

The description for the corporat/corporat.htm domain can be obtained from the IBIMRDOM.TXT file as shown in the following example.

```
"corporat/corporat.htm","restrictmyrpt","Corporate Reporting"
```

Restrict My Reports Property (MRFLAG value 'restrictmyrpt')

If the Restrict My Reports property (restrictmyrpt) is selected, and there was no previously created content in WebFOCUS 7.x, then the Auto Create My Content Folders property will not be selected and the My Content folder for those users will not be created. If there was previously created My Content, then it is migrated to WebFOCUS 8.2 Version 04 and unselecting Auto Create My Content Folders still allows access to this content.

-INCLUDE Syntax

Migration of WebFOCUS 7.x procedures (FOCEXECs) to WebFOCUS 8.2 Version 04 does not modify existing code. The -INCLUDE HREF syntax will be maintained internally for migrated code only. Any new -INCLUDEsyntax requires the use of the new IBFS syntax.

Migrating WebFOCUS Content

This section describes WebFOCUS migration considerations and provides the procedures for migrating WebFOCUS Content.

For information on migrating Reporting Server configuration settings, see the *Server Administration* manual.

Note: The following special considerations apply to WebFOCUS migration:

❏ User IDs longer than 64 characters may cause errors during migration.

❏ The WebFOCUS export utility requires Java version 1.7 or higher.

❏ If an export fails with a java.net.ConnectException error, remove the following line from the *drive*:\ibi\WebFOCUS7x\webapps\webfocus\WEB-INF\web.xml file and run the export utility again:

```
<!DOCTYPE web-app PUBLIC "-//Sun Microsystems, Inc.//DTD Web Application
2.3/EN" "http://java.sun.com/dtd/web-app_2_3.dtd">
```

❏ If your WebFOCUS installation uses MySQL Client or MySQL Server, the value for the max_allowed_packet parameter must be at least 32M. For more information, see *https://dev.mysql.com/doc/refman/5.7/en/packet-too-large.html*.

❏ If your WebFOCUS installation uses a SQL Server, the database must be case sensitive. The default for creation is case insensitive, but this should be changed before creation.

❏ In InfoAssist, you must use the Type button on the Series tab instead of the Format tab to change the chart type of a migrated chart procedure that contains bar, line, or area charts. This only affects migrated charts, not charts created after migration.

Migrating Managed Reporting Content

The following types of authentication and authorization models can be migrated from WebFOCUS 7.x releases to WebFOCUS 8.2 Version 04. Managed Reporting authorization rules from these authorization scenarios are migrated, but the security settings are not.

❏ Internal authentication with internal authorization.

❏ Trusted authentication with internal or external authorization.

❏ Realm driver DBMS/AD/LDAP authentication with internal authorization.

❏ Realm driver DBMS/AD/LDAP authentication with DBMS/AD/LDAP authorization.

❏ Realm driver with stored procedures.

In WebFOCUS 8.2 Version 04, the migration:

❏ Creates content, users, groups, roles, and rules.

❑ Handles ReportCaster as a separate migration procedure.

❑ Migrates WebFOCUS 7.x passwords to WebFOCUS 8.2 Version 04 (SHA-1 salted hash of user passwords).

❑ Sets User Default Roles.

You can perform migrations of all content or of content selected by a file that lists the Domain HREFs or group HREFs to be migrated. You can also choose whether or not to include deferred tickets or deferred output in the migration.

Note:

❑ The following characters are not allowed in usernames in WebFOCUS 8.2 Version 04:

" | ; / * , ?

During the migration process, these characters will be converted to an underscore (_).

❑ If you previously had WebFOCUS Administration Console integration, it will be lost. Any user that previously had an Administrator Role is placed into the Administrators group and has access to the Administration Console.

❑ If provisioning users externally, using AD/LDAP:

❑ All of the authorization information is now stored internally.

❑ You can configure the environment to use external authorization through AD/LDAP using WebFOCUS to AD/LDAP Group mapping.

Pre-Migration Steps for Migrating Managed Reporting Content by Group or Domain

You can migrate all Managed Reporting content, but you can also choose to migrate only the content for specified groups or Domains. Exported content always includes all users associated with the group or Domain. For groups, the content also includes all Domains associated with a group, and for Domains, the content also includes all groups associated with a Domain. In both full and partial migration, all the roles in the system are always exported.

Note: In a partial migration, you can specify content by group or by Domain, but not by a combination of both groups and Domains.

To migrate a subset of groups or Domains, you must create a plaintext file specifying the groups or Domains and place it in the mr directory before you begin the migration process. The file must list the HREF of each group or Domain on a single line. For groups, the HREFs must begin with a pound sign (#). Group and Domain HREFs are case-sensitive.

For example, you would specify the export of multiple groups with the following entries in a plain text file:

```
#domain1group
#domain2group
```

You would specify the export of multiple Domains with the following entries in a plain text file:

```
domain1/domain1.htm
domain2/domain2.htm
```

To determine a Domain HREF, right-click the Domain folder and select *Properties*.

The procedure for determining group HREFs varies depending on whether WebFOCUS uses internal or external authorization. If WebFOCUS uses internal authorization, the group HREF information is stored in the user.htm file in the basedir directory. If WebFOCUS uses external authorization, the group HREF information can be obtained from the WF_MRGROUPS table.

In the user.htm file, each group has an entry that includes the HREF, the group name, and the group display name, as shown in the following code example.

```
<A HREF='#groupname' NAME='GroupName'>Display Name</a>
```

The group HREF is based on the group name, but all special characters are removed and the HREF is made lower case.

If WebFOCUS uses external authorization, to determine the group HREF, you must first know the group name. You can find the group name by using the MRAdmin tool to view the group properties. Then, use the group name to find the group ID in the WF_MRGROUPS table. The group HREF is the group ID prefaced by a pound sign (#). For example, if the group ID is domain1group, the group HREF is #domain1group.

Once you have created the file listing the Domains or groups that you wish to export, you can begin the migration process.

Procedure: **How to Export Managed Reporting Content From WebFOCUS 7.x Releases**

The Managed Reporting migration utility exports the current WebFOCUS 7.x basedir, including Domains, procedures, content, users, groups, and role information, to a WebFOCUS7x\utilities\mr\export directory. Any authorization information stored externally using the Realm driver (SQL Repository or AD/LDAP) is also retrieved and extracted.

Note:

❑ The Managed Reporting authorization rules implemented in *Technical Memo 4624, Configuring the Managed Reporting Repository Filter* are not migrated.

❏ If you are using the Realm driver with an SQL repository, you must add your JDBC driver or drivers to the script file.

1. If you are planning a full migration, proceed to step 2. If you are planning a partial migration, create a file that lists the Domains or groups that you would like to export.

    For more information on creating this file, see *Pre-Migration Steps for Migrating Managed Reporting Content by Group or Domain* on page 20.

2. Copy the *drive*:\ibi\WebFOCUS82\utilities\mr directory into the *drive*:\ibi\WebFOCUS7x\utilities directory.

3. From the pasted directory, run mr7xto8xexport.bat in a Windows environment or mr7xto8xexport.sh on UNIX or Linux environments.

    You are prompted for the WebFOCUS version from which you are migrating.

4. Select the appropriate version.

5. You are prompted to choose whether to migrate Managed Reporting deferred tickets. Enter one of the following values:

    ❏ **1.** Yes (the default).

    ❏ **2.** No.

    ❏ **q.** Quit.

6. You are prompted to choose whether to migrate Managed Reporting deferred output. Enter one of the following values:

    ❏ **1.** Yes (the default).

    ❏ **2.** No.

    ❏ **q.** Quit.

7. You are prompted to choose whether to migrate all content or content for specific Domains or groups.

    ❏ **1.** ALL (the default).

    ❏ **2.** Domain List.

    ❏ **3.** Group List.

    ❏ **q.** Quit.

    If you selected 1, proceed to step 9. If you selected 2 or 3, proceed to step 8.

8. If you are performing a partial migration, you are prompted to choose whether to export MR Administrators. Select one of the following options:

❏ **1.** Yes (the default).

❏ **2.** No.

❏ **q.** Quit.

9. If you are migrating all content, the export process begins at once. If you are migrating content by Domain or group, you will be prompted to enter the name of the file that contains the list of Domains or groups. This is the file that you created in step 1.

   WebFOCUS notifies you when the export process is complete. By default, the exported files are saved in the WebFOCUS7x\utilities\mr\export directory. The export log, which is named mr_migrate_export.log, is saved in the same directory. The directory also contains a file named reposTree.xml, which lists all the users and Domains that have been exported. The reposTree.xml file is used during ReportCaster migration. For more information, see *Migrating ReportCaster Content* on page 29.

10. Copy the WebFOCUS7x\utilities\mr\export directory into the WebFOCUS82\migration_import directory.

Now you can import the exported Managed Reporting content into WebFOCUS 8.2 Version 04.

Procedure: **How to Import Managed Reporting Content Into WebFOCUS 8.2 Version 04**

You must have already created and initialized the database repository with the default values contained within the initial load, using WFReposUtil and the original XML.

When you perform a partial migration, you have multiple choices for how the target environment will handle the newly migrated resources:

❏ **Skip**. Do not import these resources at all.

❏ **Add new resources (do not update)**. Import new resources, but do not modify resources that already exist in the target environment. This is the default behavior.

❏ **Add new resources and update existing resources**. All new resources will be added to the target environment. If a resource exists in both the import package and the target environment, the resource in the target will be overwritten with the version in the import package.

You can select individual import behavior for content resources, roles, groups, and users. For example, you can choose to skip content resources, add new roles, and add and update users. *Add new resources (do not update)*, which is the default behavior, is also the most common selection.

1. Import the Managed Reporting content by running the *drive*:\ibi\WebFOCUS82\utilities\mr\mr_migrate_import.bat script in a Windows environment or the *drive*:/ibi/WebFOCUS82/utilities/mr/mr_migrate_import.sh script in a UNIX or Linux environment.

   Note: User IDs longer than 64 characters may cause errors in the import process.

2. When prompted, enter a Managed Reporting administrator ID and password.

3. Enter the import package name.

4. Select one of the following options to set the logging level:

   ❏ **1** for info. This is the recommended setting.

   ❏ **2** for debug.

   ❏ **q** to quit the import process.

5. Select one of the following options to determine whether you are performing a full or partial migration:

   ❏ **1** for a full migration (the default).

   ❏ **2** for a partial migration.

   ❏ **q** to quit the import process.

   If you selected full migration, the import process begins immediately. If you selected partial migration, proceed to the next step.

6. Select one of the following options to determine how WebFOCUS merges imported and existing content resources:

   ❏ **1** to add new resources only, without replacing existing resources (the default).

   ❏ **2** to add new resources and update existing resources.

   ❏ **q** to quit the import process.

7. Select one of the following options to determine how WebFOCUS imports roles:

   ❏ **1** to skip roles.

   ❏ **2** to add new roles (the default).

   ❏ **3** to add new roles and replace existing roles.

❏ **q** to quit the import process.

8. Select one of the following options to determine how WebFOCUS imports groups:

   ❏ **1** to skip groups.

   ❏ **2** to add new groups (the default).

   ❏ **3** to add new groups and update existing groups.

   ❏ **q** to quit the import process.

9. Select one of the following options to determine how WebFOCUS imports users:

   ❏ **1** to skip users.

   ❏ **2** to add new users (the default).

   ❏ **3** to add new users and update existing users.

   ❏ **q** to quit the import process.

10. Select one of the following options to determine whether to import rules on resources:

   ❏ **1** to skip rules.

   ❏ **2** to import rules (the default).

   ❏ **q** to quit the import process.

WebFOCUS notifies you when the import is complete. Files are saved in the *drive*: \WebFOCUS82\migration_import\export directory, along with the import log file, which is named import_migration.log.

Migrating Favorites and Mobile Favorites

In WebFOCUS 8, Favorites and Mobile Favorites content is stored in the database repository. Earlier versions of WebFOCUS stored this content in the worp_users folder of the worp directory. As a result, the migration of Favorites and Mobile Favorites requires a pre-migration of the worp directory from an earlier version of WebFOCUS to WebFOCUS 8 followed by the migration of individual user Favorites and Mobile Favorites content from the worp_users folder to the database repository.

The pre-migration of the worp directory to WebFOCUS 8 uses the Business Intelligence Dashboard (BID) migration utility. Even though the Business Intelligence Dashboard was discontinued in WebFOCUS 8, it still supports the worp directory migration, and this migration is the only remaining use for this utility.

The migration of Favorites and Mobile Favorites content from the worp_users folder to the database repository uses the Favorites Migration utility developed for WebFOCUS 8.

Note: After performing the Business Intelligence Dashboard migration, saved searches from WebFOCUS 7.7 do not appear in WebFOCUS Release 8.0 Version 04. The XML file containing the search is moved from WebFOCUS 7.7 to Release 8.0 Version 04, but it is not used. Saved Searches can be migrated as part of the Favorites migration utility that migrates the Favorites and Mobile Favorites items list for each user.

Pre-Migration Steps for Migrating Favorites and Mobile Favorites

The pre-migration of favorites and mobile favorites uses the Business Intelligence Dashboard (BID) Migration utility to migrate worp directory folders from an earlier version to WebFOCUS 8. The entire worp directory does not migrate, only the worp_users folder, the worp_custom folder, and the userdata folder, if it exists.

The BID Migration utility is located in the *drive*:\ibi\WebFOCUS82\utilities\mr directory. It is named bid_migrate_extract.bat in Windows and bid_migrate_extract.sh in UNIX. It copies files from the *drive*:\ibi\WebFOCUS7x\worp directory for use with the latest WebFOCUS release.

Perform the pre-migration of Favorites and Mobile Favorites only after the Managed Reporting migration steps have been completed.

Procedure: **How to Export Dashboard Content to Support Migration of Favorites and Mobile Favorites in a Windows Environment**

1. Copy the *drive*:\ibi\WebFOCUS82\utilities\mr directory into the *drive*:\ibi\WebFOCUS7x\utilities directory.

2. Stop your web and application servers.

3. Run the *drive*:\ibi\WebFOCUS7x\utilities\mr\bid_migrate_extract.bat script.

   The Dashboard Migration Utility dialog box appears.

4. Select *Extract an existing Dashboard environment* and click *Next*.

5. Specify the worp directory for the existing Dashboard environment and click *Next*.

   A directory may appear, by default, if the worp directory exists under the WebFOCUS installation directory.

   Note: The migration utility also migrates the *drive*:\ibi\WebFOCUS7x\ibi_html\publish directory and the *drive*:\ibi\WebFOCUS7x\ibi_html\template directory. These directories are no longer created by the WebFOCUS install and will not appear in new full installations of WebFOCUS 8.

6. Select the release from which you are migrating and click *Next*.

WebFOCUS notifies you when the extraction is complete. The migrate.zip and bid_extract.log files are saved in the *drive*:\ibi\WebFOCUS77\utilities\mr\export\ directory.

Procedure: **How to Export Dashboard Content to Support Migration of Favorites and Mobile Favorites in a UNIX Environment**

1. Stop your web and application servers.

2. Run the *drive*:/ibi/WebFOCUS7x/utilities/mr/bid_migrate_extract.sh script.

   The Dashboard Migration prompt is displayed.

3. Enter *1* to export Dashboard data from the old release.

4. WebFOCUS displays a default path to the worp directory.

5. If the directory listed is correct, press Enter. If the directory listed is incorrect, type the correct directory path and press Enter.

   Note: The migration utility also migrates the *drive*:/ibi/WebFOCUS7x/ibi_html/publish directory and the *drive*:/ibi/WebFOCUS7x/ibi_html/template directory. These directories are no longer created by the WebFOCUS install and will not appear in new full installations of WebFOCUS 8.

6. If the default path is correct, press Enter. Otherwise, specify the path to the worp directory.

   The utility prompts for the WebFOCUS release number from which you are migrating.

7. Type one of the following values to specify the release from which you exporting data, and click *Next*.

   Valid options are:

   ❑ **1** for WebFOCUS 7.7

   ❑ **2** for WebFOCUS 7.6

   ❑ **3** for WebFOCUS 7.1

   ❑ **4** to exit the migration utility.

WebFOCUS notifies you when the data is successfully loaded in the database. The bid_load.log file is created in the *drive*:\ibi\WebFOCUS82\migration_import directory.

Procedure: **How to Import Dashboard Content to Support Migration of Favorites and Mobile Favorites in a Windows Environment**

1. Copy the migrate.zip file from the *drive*:\ibi\WebFOCUS7x\utilities\mr directory into the *drive:*\ibi\WebFOCUS82\migration_import directory.

2. Stop your web and application servers.

3. Run the *drive*:\ibi\WebFOCUS82\utilities\mr\bid_migrate_import.bat script.

4. Select the WebFOCUS release from which you are exporting and click *Next*.

WebFOCUS notifies you when the data is successfully loaded in the database. The bid_load.log file is created in the *drive*:\ibi\WebFOCUS82\migration_import directory.

Procedure: ### How to Import Dashboard Content to Support Migration of Favorites and Mobile Favorites in a UNIX Environment

1. Copy the migrate.zip file from the *drive*:/ibi/WebFOCUS7x/utilities/mr directory to the *drive*:/ibi/WebFOCUS82/migration_import directory.

2. Stop your web and application servers.

3. Run the *drive*:/ibi/WebFOCUS82/utilities/mr/bid_migrate_import.sh script.

   The Dashboard Migration Utility prompt appears.

4. Enter *2* to import data into WebFOCUS 8.

WebFOCUS notifies you when the data is successfully loaded in the database. The bid_load.log file is created in the *drive*:/ibi/WebFOCUS82/migration_import directory.

Migration Steps for Favorites and Mobile Favorites

The Favorites Migration utility migrates Favorite and Mobile Favorites for each individual user from the favorites.xml file in the *drive:*\ibi\WebFOCUS82\worp\worp_users*username* directory to the database repository.

This migration step should be performed after the Managed Reporting and Business Intelligence Dashboard migration steps have been completed.

Procedure: ### How to Migrate Favorites and Mobile Favorites in a Windows Environment

1. Edit user ID and password in the favoritesmigration.bat file, if necessary. The user ID and password are set to admin, by default.

2. Run the *drive*:\ibi\WebFOCUS82\utilities\bip\favoritesmigration.bat script.

The favorites_migration.log file is created in the *drive*:\ibi\WebFOCUS82\utilities\bip directory.

Procedure: ### How to Migrate Favorites and Mobile Favorites in a UNIX environment

1. Edit the user ID and password in the favoritesmigration.sh file, if necessary. The user ID and password are set to admin, by default.

2. Run the *drive*:/ibi/WebFOCUS82/utilities/bip/favoritesmigration.sh script.

The favorites_migration.log file is saved in the *drive*:/ibi/WebFOCUS82/utilities/bip directory.

Migrating ReportCaster Content

To migrate ReportCaster content from a WebFOCUS 7.x Repository to WebFOCUS 8.2 Version 04, you need to export the content from the WebFOCUS 7.x Repository and then import it into WebFOCUS 8.2 Version 04.

If you are migrating both Managed Reporting and ReportCaster content, you must export the Managed Reporting content before you export the ReportCaster content. When you are importing, you must also import the Managed Reporting content before you import the ReportCaster content.

The Managed Reporting export creates the reposTree.xml file, which lists the users and Domains exported by Managed Reporting. The ReportCaster export includes content for these users and for ReportCaster Administrators. You can also choose to export non-Domain-based content for these users and Administrators.

Optionally, you can filter the Library content by updating the rcLibraryExport2XML.properties file in the rc directory. This filter applies whether or not you are migrating Managed Reporting content. It is recommended that you use the filter in self-service installations where Managed Reporting is not installed.

Filtering Library Migration Exports by Date

The rcLibraryExport2XML.properties file, located in the *drive*:\ibi\WebFOCUS82\utilities\rc folder in Windows or in the *install_directory*/ibi/WebFOCUS82/utilities/rc folder in UNIX or Linux, contains an optional setting called libraryDateRange. When you assign a range of dates to this setting, the rcExport2XML program exports only those Library Reports that contain a Last Execution Date that falls within that date range.

The ability to limit the export of Library Report content in this way allows you to conduct a series of smaller-scale partial migrations that simplifies and speeds the migration process instead of requiring you to conduct a single lengthy and error-prone, large-scale migration.

Note: When a Library item is selected for migration, all report versions in that Library item are exported. These report versions may include those that with a Last Execution Date outside of the chosen date range.

Understanding the libraryDateRange Value Format

All values use the format:

startDate,endDate

where:

startDate

Is the earliest date in the range. Library reports containing a last execution date that falls on the start date or any date thereafter, up to the end date if defined, or the current date, if no end date is defined, are included in the export.

endDate

Is the most recent date in the range. Library reports containing a last execution date that falls on the end date or any previous date, back to the start date, if defined, or the earliest library report date, if no start date is defined, are included in the export.

The comma between the start date and the end date acts as a date separator.

Dates for the libraryDateRange setting must use the YYYYMMDD format.

No more than two dates can be used for the libraryDateRange setting.

When running the rcExport2XML program, you must clear the placeholder from this value, and replace it with one of the following configurations.

When the libraryDateRange setting contains no date value, the rcExport2XML program includes all Library Report items in the export, as shown in the following example.

`libraryDateRange=`

When the libraryDateRange setting contains a single date value placed before a comma, the rcExport2XML program includes all Library Report items with a last execution date on or after the date value, as shown in the following example.

`libraryDateRange=20160701,`

When the libraryDateRange setting contains a single date value placed after a comma, the rcExport2XML program includes all Library Report items with a last execution date on or before the date value, as shown in the following example.

`libraryDateRange=,20160701`

When the libraryDateRange setting contains two dates separated by a comma, the rcExport2XML program includes all Library Report items with a last execution date on or between the start date and the end date as shown in the following example.

`libraryDateRange=20160701,20160731`

Procedure: **How to Export ReportCaster Content From WebFOCUS 7.7.x and 7.6.x Releases**

Prior to migrating your 7.7 ReportCaster content, you can utilize the library purge and schedule purge utilities to reduce the amount of content that you migrate. To get access to these utilities, contact customer support.

Note: The WebFOCUS 7.7.x directory tree contains files and folders within the structure of a unified directory for ReportCaster and Managed Reporting. The WebFOCUS 7.6.x directory tree contains separate standalone directory trees for ReportCaster and Managed Reporting. The rcExport2XML.bat file within the WebFOCUS82\utilities\rc directory manages the migration of ReportCaster content can accommodate these variances, but it must be placed within the appropriate location as described in step 1 of this procedure.

1. Copy and paste the WebFOCUS82\utilities\rc directory to the appropriate location as follows:

    a. If you are migrating from a WebFOCUS 7.6.x release:

       Copy the *drive*:\ibi\WebFOCUS82\utilities\rc directory into the *drive*:\ibi \WebFOCUS76\ReportCaster directory.

    b. If you are migrating from a WebFOCUS 7.7.x release:

       Copy the *drive*:\ibi\WebFOCUS82\utilities\rc directory into the *drive*:\ibi \WebFOCUS77\ReportCaster directory.

    Note:

    ❑ If you are performing both Managed Reporting and ReportCaster migrations, and WebFOCUS and the Distribution Server are installed on separate machines, you must copy the reposTree.xml file from the *drive*:\ibi\WebFOCUS7*x*\utilities\mr\export directory to the Distribution Server rc directory.

    ❑ Migrating a large amount of Library content may affect the speed of migration.

2. To ensure that the rcExport2XML utility connects to Java SE 7:

    a. Under the ReportCaster 7x Distribution Server installation, you must navigate to the ibi\ReportCaster76\rc directory, if you are migrating from a ReportCaster 7.6.x release or to the ibi\WebFOCUS77\ReportCaster\rc directory if you are migrating from a ReportCaster 7.7.x release.

    b. Open one of the following files to edit the rcExport2XML utility with a text editor:

       ❑ For Windows: Open rcExport2XML.bat.

       ❑ For UNIX: Open rcExport2XML.sh.

    c. Locate the following command:

```
:docall java %JAVA_OPTS% -Dfile.encoding=%ENCODING% -cp "%CLASSPATH
%" ibi.broker.Export2XML %~dp0..\..\cfg %USERNAME% %PASSWORD%
%EXPDIRLOC% %EXPLIB%,
```

and type the full path to Java SE 7.

d. Save your changes and close the rcExport2XML utility file.

3. Run rcExport2XML.bat on Windows or rcExport2XML.sh on UNIX or Linux.

4. Enter a ReportCaster Administrator ID and password.

Note: This is the Administrator ID and password that you configure in the ReportCaster Console. By default the Administrator ID is admin and the password is blank. Changing the password in Managed Reporting Administration does not change the ReportCaster configuration file. If you have not used the ReportCaster Console or the command line editit utility to change this id or password, the credentials to use for the migration extract are admin with a blank password.

5. When asked whether you have already migrated Managed Reporting content, select one of the following options:

❏ **1** for yes (the default). In this case, the ReportCaster import will require the reposTree.xml file from the Managed Reporting migration extract.

❏ **2** for no. Select this if there are no users in Managed Reporting.

❏ **q** to quit the export process.

If you selected 2, proceed to step 6. Otherwise, proceed to step 5.

6. Select one of the following options to determine whether to include non-Domain-based Schedules and Library reports for exported users:

❏ **1** for yes (the default).

❏ **2** for no.

❏ **q** to quit the export process.

7. Select one of the following options to determine how much ReportCaster content and Library content to include in the export package:

❏ **1** to export all ReportCaster content, including Library content. Schedules, Distribution Lists, Access Lists, and Library content will be exported. This is the default setting.

❏ **2** to export ReportCaster content without Library reports. Schedules, Distribution Lists, and Access Lists will be exported.

❏ **3** to export only Library reports.

❏ **q** to quit the export process.

Note: Library content will be additionally filtered by the rcLibraryExport2XML.properties file.

The migration script exports content owned by ReportCaster Administrators and the users specified by reposTree.xml. The following content is exported:

❏ Domain-based Schedules of report procedures associated with the Domains specified by reposTree.xml.

❏ Domain-based Library Reports from procedures associated with the Domains specified by reposTree.xml.

❏ Distribution Lists.

❏ Library Access Lists.

❏ Execution IDs.

❏ Global Blackout Dates and Group Blackout Dates for the groups belonging to the users who are listed in reposTree.xml.

Schedules and Library Reports associated with Domains that are not listed in reposTree.xml are not exported.

If you choose to include non-Domain-based content, ReportCaster will also export non-Domain-based Schedules and Library Reports owned by ReportCaster Administrators and users specified by reposTree.xml.

WebFOCUS notifies you when the export process is complete. By default, the exported data saved in the *drive*:\ibi\WebFOCUS7x\ReportCaster\rc\rc_export directory, along with a log file named export_migration.log.

The export typically contains the following files and folders in addition to the log file:

❏ accessList

❏ addrBook

❏ blackoutDate

❏ execId

❏ library

❏ schedule

Now you can import the exported ReportCaster content into WebFOCUS 8.2 Version 04.

Procedure: **How to Export ReportCaster Content From WebFOCUS 7.1.x**

1. If you are migrating from WebFOCUS 7.1.x releases, copy the *drive*:\ibi \WebFOCUS82\utilities\rc directory into the *drive*:\ibi\WebFOCUS7x\ReportCaster directory.

    Note:

    ❏ Migrating a large amount of Library content may affect the speed of migration.

    ❏ Only full migration from release 7.1 is supported. Partial migration is not supported.

2. Run rc71Export2XML.bat on Windows or rc71Export2XML.sh on UNIX or Linux.

3. Enter a ReportCaster Administrator ID and password.

    Note: This is the Administrator ID and password that you configure in the ReportCaster Console.

4. Select one of the following options to determine how much ReportCaster content and Library content to include in the export package:

    ❏ **1** to export all ReportCaster content, including Library content. Schedules, Distribution Lists, Access Lists, and Library content will be exported. This is the default setting.

    ❏ **2** to export ReportCaster content without Library reports. Schedules, Distribution Lists, and Access Lists will be exported.

    ❏ **q** to quit the export process.

    Note: Library content will be additionally filtered by the rc71LibraryExport2XML.properties file.

The following content is exported:

❏ Schedules.

❏ Library Reports.

❏ Distribution Lists.

❏ Library Access Lists.

❏ Execution IDs.

WebFOCUS notifies you when the export process is complete. By default, the exported data saved in the *drive*:\ibi\WebFOCUS7x\ReportCaster\rc\rc_export directory, along with a log file named export_migration.log.

The export typically contains the following files and folders in addition to the log file:

❏ accessList

❏ addrBook

❏ execId

❏ library

❏ schedule

Now you can import the exported ReportCaster content into WebFOCUS 8.2 Version 04.

Procedure: **How to Import ReportCaster Content Into WebFOCUS 8.2 Version 04**

Note: If you are migrating both Managed Reporting and ReportCaster content, you must perform the Managed Reporting migration before you import ReportCaster content from an earlier release.

When you perform a partial migration, you have multiple choices for how the target environment will handle the newly migrated resources:

❏ **Skip**. Do not import these resources at all.

❏ **Add new resources (do not update)**. Import new resources, but do not modify resources that already exist in the target environment. This is the default behavior.

❏ **Add new resources and update existing resources**. All new resources will be added to the target environment. If a resource exists in both the import package and the target environment, the resource in the target will be overwritten with the version in the import package.

You can select individual import behavior for Schedules and other non-Library content and for Library Reports. For example, you can choose to skip Schedules and other non-Library content and add new Library Reports. *Add new resources (do not update)*, which is the default behavior, is also the most common selection.

1. Copy the *drive*:\ibi\WebFOCUS7x\ReportCaster\rc\rc_export directory into the *drive*:\ibi \WebFOCUS82\migration_import directory.

2. Run the *drive*:\ibi\WebFOCUS82\utilities\rc\rc_migrate_import.bat script in a Windows environment or the *drive*:/ibi/WebFOCUS82/utilities/rc/rc_migrate_import.sh script in a UNIX or Linux environment.

3. If prompted, enter a WebFOCUS administrator ID and password.

4. Select whether to perform a full or partial migration:

   ❏ **1** for a full migration (the default).

   ❏ **2** for a partial migration.

   ❏ **q** to quit the import process.

5. If you are performing a full migration, proceed to step 7. If you are performing a partial migration, select one of the following options, depending on whether the WebFOCUS groups and users for the ReportCaster content have already been created:

   ❏ **1** if WebFOCUS groups and users have already been created. This is the default setting.

   ❏ **2** if you want groups and users to be created during the ReportCaster import process.

   ❏ **q** to quit the import process.

6. If you are performing a partial migration, you will be prompted to select one of the following options:

   ❏ **1**. Skip Schedules, Distribution Lists, Access Lists, Blackout Dates, and Execution IDs.

   ❏ **2**. Add new resources (but do not update existing resources). This is the default setting.

   ❏ **3**. Add new resources and update existing resources.

   ❏ **q**. Quit the import process.

7. Select one of the following options to determine whether you will import Library reports:

   ❏ **1**. Skip Library reports.

   ❏ **2**. Add new Library reports (but do not update existing reports). This is the default setting.

   ❏ **3**. Add new Library reports and update existing reports.

   ❏ **q**. Quit the import process.

8. Select one of the following options to set the logging level:

   ❏ **1** for info. This is the recommended setting.

   ❏ **2** for debug.

   ❏ **q** to quit.

WebFOCUS notifies you when the import is complete. The log file created from the import is saved in the *drive*:/ibi/WebFOCUS82/migration_import/rc_export directory.

Procedure: **How to Import ReportCaster Content for a Full Migration**

1. Select one of the following options, depending on whether the WebFOCUS groups and users for the ReportCaster content have already been created:

   ❏ **1** if WebFOCUS groups and users have already been created. This is the default setting.

   ❏ **2** if you want groups and users to be created during the ReportCaster import process.

   ❏ **q** to quit the import process.

2. Select one of the following options, depending on whether you are importing Library reports:

   ❏ **1** to import Library reports. This is the default setting.

   ❏ **2** to not import Library reports.

   ❏ **q** to quit the import process.

WebFOCUS notifies you when the import is complete. The log file created from the import is saved in the *drive*:/ibi/WebFOCUS82/migration_import/rc_export directory.

Procedure: **How to Import ReportCaster Content for a Partial Migration**

1. Select one of the following import options:

   ❏ **1** to skip Schedules, Distribution Lists, Access Lists, Blackout Dates, and Execution IDs.

   ❏ **2** to add new resources (but not update existing resources). This is the default setting.

   ❏ **3** to add new resources and update existing resources.

   ❏ **q** to quit the import process.

2. Select one of the following options to determine whether you will import Library reports:

   ❏ **1** to skip Library reports.

   ❏ **2** to add new Library reports (but not update existing reports). This is the default setting.

   ❏ **3** to add new Library reports and update existing reports.

❏ **q** to quit the import process.

WebFOCUS notifies you when the import is complete. The log file created from the import is saved in the *drive*:/ibi/WebFOCUS82/migration_import/rc_export directory.

Migration in Place

There is an alternate migration utility that enables a migration in place, that is, a conversion of a WebFOCUS 7.x release repository into a WebFOCUS 8 repository without requiring the export and import of the Report Library. This utility is located in the WebFOCUS82\utilities \WFReposUtil folder and is named upgrade7xDBto8x.bat for Windows and upgrade7xDBto8x.sh for UNIX and Linux. It is available for Oracle, Derby, Microsoft SQL Server 2008 and 2012, and IBM DB2 repositories.

The BOTLDATA table, which contains the report output stored in the Report Library, is the table with the largest amount of data. The new utility allows for migration of existing WebFOCUS 7.x ReportCaster BOT tables to WebFOCUS 8.2 Version 04 without dropping the WebFOCUS 7.x BOTLDATA table.

Note: Since migration in place converts a 7.x repository to an 8.2.04 repository, your 8.2.04 installation must be configured to use the 7.x repository at the time the migration in place is performed. If you configured a different repository during the 8.2.04 installation, you must change the 8.2.04 repository connection information before performing an in place migration.

Procedure: **How to Migrate in Place**

1. Ensure that there is a database backup of the existing WebFOCUS 7.x ReportCaster repository tables. This is a best practice when running the migration process several times during testing. Ensure that the WebFOCUS 8.2 Version 04 installation is configured to use the 7.x repository.

2. If Managed Reporting content is being migrated, follow the WebFOCUS 8.2 Version 04 export steps in *Migrating Managed Reporting Content* on page 19.

3. Copy the exported Managed Reporting content (utilities/mr/export) to the WebFOCUS 8.2 Version 04 migration_import directory.

4. Follow the WebFOCUS 8.2 Version 04 export steps for ReportCaster in *Migrating ReportCaster Content* on page 29.

5. When prompted for the export library option, enter *2* (false). This option will export the Library report references, but will not export the actual report output.

6. Copy the exported ReportCaster content (utilities/rc/rc_export) to the WebFOCUS 8.2 Version 04 migration_import directory.

7. Review and modify the upgrade7xDBto8x script:

    a.   If you are migrating Managed Reporting content, change the value of MR_ENABLED to *yes*.

    b.   After you complete the above steps and are ready to run the migration script, change the value of run_type to *actual*.

8.   Press Enter to run the upgrade7xDBto8x script.

9.   When prompted for repository credentials, enter an ID and password. These credentials are validated against the repository credentials specified in the WebFOCUS 8.2 Version 04 webconfig.xml file.

10. When prompted for valid WebFOCUS credentials, enter a WebFOCUS 8.2 Version 04 administrator ID and password (for example, admin/admin).

11. At the following prompt, enter:

- ❏ **1.** (yes) if the WebFOCUS groups and users have been created by running the MR import utility or have been manually created (the default).

- ❏ **2.** (no) if you want the ReportCaster import processing to create WebFOCUS groups and users.

  Note: This option should be specified if Managed Reporting content is not being migrated.

- ❏ **q.** to quit.

12. Even though the actual reports are not technically being migrated, the Library report references and links to the reports need to be migrated. When prompted to import Library reports, select:

- ❏ **1.** yes (the default).

- ❏ **2.** no.

- ❏ **q.** to quit.

As the script is running, you will see the output indicating the status of the migration process. This also provides some insight into the specific tasks that are included in this process.

The following standard migration logs should be used for review of any import errors:

- ❏ Repository Creation and Load

  drive:\ibi\WebFOCUS82\utilities\WFReposUtil\WFReposUtilCmdLine.log

- ❏ Managed Reporting

  drive:\ibi\WebFOCUS82\migration_import\export\mr_migrate_import.log

❑ ReportCaster

drive:\ibi\WebFOCUS82\migration_import\rc_export\rc_migrate_import.log

As is the case for all migrated ReportCaster content in WebFOCUS 8.2 Version 04, the schedules that run Reporting Server procedures are migrated to the ReportCaster folder. The Report Library content is migrated to the Library Content folder.

Migrated ReportCaster Content

After migration, ReportCaster content is placed in designated folders in WebFOCUS 8.2 Version 04. The migration import creates:

❑ Two folders named ReportCaster and Library Content.

❑ A My Content folder for each user who has migrated ReportCaster content. Schedules, Distribution Lists, and Access Lists that belong to a user are placed in the My Content folder for that user.

❑ Folders for Categories under the Library Content folder. Under each Category folder, the import creates a Library item with the name of the migrated report and adds the report versions to that Library item. If the report is burst, a folder is created with the name of the report and a Library report item is created in that folder for each burst value. The report versions for each burst value are placed in the Library item for that burst value.

❑ A Library Content folder under each domain folder that has Library report output. If that Library output was stored under a Category, the import also creates a Category folder under the Library Content. The Library item with the name of the migrated report is created under the Library Content or Category folder and the report versions are added to that Library item. If the report is burst, a folder is created with the name of the report and a Library report item is created in that folder for each burst value. The report versions for each burst value are placed in the Library item for that burst value.

❑ When a schedule with distribution to a Prepared Report directory is migrated, the FTP Host and Location are set to the values of the Prepared Report directory in the previous installation. This schedule will continue to run, provided that the distribution server in WebFOCUS 8.2 Version 04 has FTP access to this location.

❑ If you migrate WebFOCUS 7.x ReportCaster schedules to WebFOCUS 8.2 Version 04, and the Reporting Server node referenced in a particular schedule has not been defined in WebFOCUS 8.2 Version 04, the migration process will automatically create a Reporting Server node with that name in the ReportCaster configuration file of the WebFOCUS 8.2 Version 04 installation.

❏ Migrated Managed Reporting schedules will display the Name information as the WebFOCUS 7.x path (HREF) value. New schedules created in WebFOCUS 8.2 Version 04 will display the IBFS path value.

❏ If a Library report from a domain that has been deleted from Managed Reporting is migrated, the report will be placed in a folder in the repository. The folder is named after the original Domain HREF and appended with the words (Domain not Found).

❏ When migrating from WebFOCUS 7.x release to WebFOCUS 8.2 Version 04, in order to view migrated applet-based graphs in the Report Library, the WebFOCUS 7.x ibi_html alias must exist in WebFOCUS 8.2 Version 04.

For example, if you have a WebFOCUS 7.x installation with an alias of ibi_html_7x, you will have a report with a src=ibi_html_7x/javaassist reference. If you install WebFOCUS 8.2 Version 04 with an alias of ibi_html_82 and migrate the library from a WebFOCUS 7.x release, you will not be able to view migrated reports that contain applet graphs. To prevent this, add the ibi_html_7x alias to the application server and point that alias to the WebFOCUS 8.2 Version 04 installation. You can have ibi_html_82 for the WebFOCUS 8.2 Version 04 installation, but you must also have ibi_html_77 for migrated reports that contain applet graphs to work.

Procedure: How to Delete Reports From the Report Library

1. Run the *drive*:\ibi\WebFOCUS82\ReportCaster\bin\purgelib.bat script in a Windows environment or the *drive*:/ibi/WebFOCUS82/ReportCaster/bin/purgelib.sh script in a UNIX or Linux environment.

2. When prompted, type a WebFOCUS administrator ID and password.

3. Type a cutoff date, in the format YYYYMMDD. Any Library report created before the specified cutoff date will be deleted from the Library.

4. Type *Y* to confirm the deletion.

Post-Migration Steps

If you are migrating from a WebFOCUS 7.x release to WebFOCUS 8.2 Version 04, you must take additional steps to enable the display of the User Default Role tab in the Security Center and to configure the public user. If the WebFOCUS 7.*x* public user is named *public*, the user is migrated to WebFOCUS 8.2 Version 04 and assigned the WF_Role_Public UDR. However, if the user has been given another name, the account will be migrated but not automatically assigned the WF_Role_Public UDR. You must manually update this account if you wish to continue using it as the public user.

Regardless of the account name, the WebFOCUS Reporting Server credentials for the public user are not migrated from WebFOCUS 8.2 Version 04. The Reporting Server credentials must always be entered manually.

Procedure: **How to Display the User Default Role Tab in the Security Center**

1. Sign in to WebFOCUS 8.2 Version 04 as an administrator and select *Administration Console* from the Administration menu.

   The Administration Console opens

2. On the Configuration tab, under the Application Settings folder, click *Other*.

3. Set IBI_Enable_UDR to *True*, save your changes, and close the Administration Console.

4. In the BI Portal, select *Security Center* from the Administration menu.

   The Security Center opens.

5. Click the *New User* button or select an existing user and click *Edit User.*

   The New User or Edit User dialog box opens, with the Default Role tab enabled, as shown in the following image.
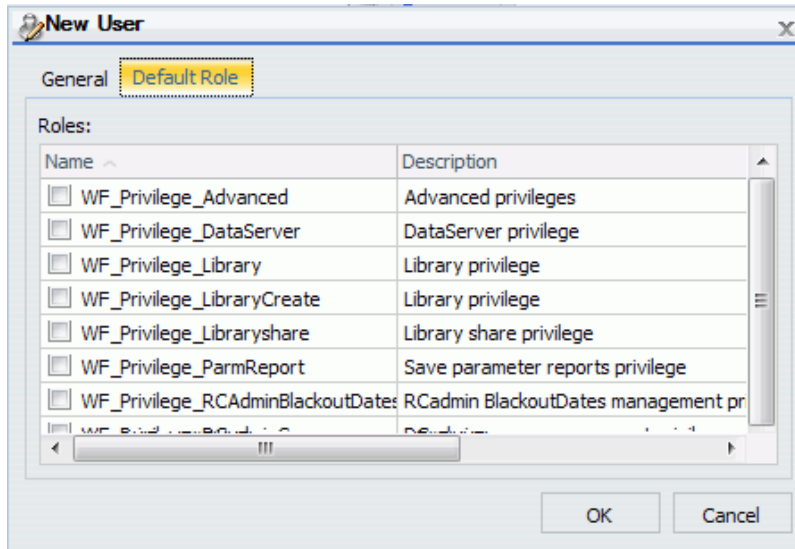
Procedure: **How to Configure the Public User In WebFOCUS 8.2 Version 04 Enterprise Edition**

The WebFOCUS Reporting Server credentials for the public user are not migrated from WebFOCUS 8.2 Version 04 and must be entered manually. Additionally, if the public user is not named *public,* the account will be migrated but not automatically assigned the WF_Role_Public UDR. You must manually update this account if you wish to continue using it as the public user.

Note: The public user or Anonymous Access, is only available with a license that supports it.

1. Sign in to WebFOCUS 8.2 Version 04 as an administrator and select *Administration Console* from the Administration menu.

   The Administration Console opens.

2. On the Security tab, expand the Security Configuration folder, and click *Advanced*.

3. If the public user is named *public,* proceed to step 4. If the public user account has another name, type the name in the Anonymous User ID (IBI_ANONYMOUS_USER) field.

4. Type the Reporting Server user ID and password in the Reporting Server Anonymous User ID (IBI_ANONYMOUS_WFRS_USER) and Reporting Server Anonymous Password (IBI_ANONYMOUS_WFRS_PASS) fields respectively.

5. Save your changes and restart the application server.

6. If the public user is named *public,* you have finished configuring the public user. If the public user account has another name, sign in to WebFOCUS again and select *Security Center* from the Administration menu.

   The Security Center opens.

7. Select the public user, right-click, and select *Edit*.

8. Click the *Default Role* tab.

9. Select the WF_Role_Public role. If any other roles are assigned to the public user, remove them, then click *OK* to return to the Security Center.

10. Add the public user to the Anonymous group and click *Close* to exit the Security Center.

The public user is now configured.

Glossary

This is a glossary of key terms and concepts in this manual as they relate to Migration.

Active Directory (AD)	A directory service that authenticates and authorizes users and computers. For example, when a user signs in to a domain, Active Directory will determine whether the user is a system administrator or a normal user. An Active Directory uses the Lightweight Directory Access Protocol (LDAP).
Administration Console	The interface that administrators use to manage the WebFOCUS environment and configuration settings.
application server	Application servers (or servlet containers) generally handle Java and non-traditional processing. In WebFOCUS documentation, the term application server refers to an application server, servlet container, servlet engine, or J2EE engine. IBM® WebSphere®, Oracle® WebLogic®, Oracle Java® System Application Server, and Apache Tomcat☐ are common application servers or servlet containers.
domain	The highest level of organization in WebFOCUS. Domains organize data on a particular topic (such as sales, inventory, or personnel). The data is provided in different forms in the following domain components: predefined reports (Standard Reports), data sources used to create reports (Reporting Objects), and reports created and saved by users (My Reports, Custom Reports, and Shared Reports).
export	A process by which data is extracted into a file structure consisting of XML files and folders. This extracted information structure is used for the import process.
group	A collection of users or subgroups which require similar capabilities or access to the same resources. A group may be created for certain privileges, such as MRAdmin, RCAdmin, Schedule, or Library.
import	A process which reads the extracted file package and imports the content into the WebFOCUS 8.2 Version 04 environment.

Lightweight Directory Access Protocol (LDAP)	An application protocol for accessing and maintaining distributed directory information services over an Internet Protocol (IP) network. WebFOCUS can be configured to use LDAP for external authentication or authorization.
Managed Reporting	A reporting tool for enterprise-wide business intelligence (BI) and information delivery activities.
Mobile Favorites	An Information Builders mobile server platform that delivers business content to any mobile device.
privileges	A function that controls access to a tool, resource, or ability. For example, legacy privileges allow legacy product behavior when migrating from WebFOCUS 7.x to WebFOCUS 8.2 Version 04.
Realm Driver	A tool that synchronizes user privileges and groups with the ReportCaster repository during Managed Reporting sign in. When used with an RDBMS, the MR Realm Driver maintains a connection pool to improve performance. It also has other functions related to Managed Reporting.
ReportCaster	A scheduling and distribution application that centralizes the execution and distribution of reports and other WebFOCUS content.
Report Library	An interface that provides secure access to report content, the ability to save multiple versions of the same output, and the ability to set an expiration date and control the number of versions kept in the library. When creating a schedule to distribute report output to the Report Library, the access options allow the user to specify who is authorized to access the report. The access options are: the owner of the schedule, all users authorized to access the WebFOCUS Repository folder the report is stored in, or a Library Access List which specifies the desired groups and users.
repository table	Stores information by utilizing mapped values for organizational purposes. Various products use repository tables in different ways.

For example, ReportCaster stores scheduling and distribution information in its repository tables.

User Default Roles (UDR) A group of bundled privileges that recreate the functionality associated with user roles in WebFOCUS 7.x for the new security implementation in WebFOCUS 8.2 Version 04. During migration, WebFOCUS 7.x roles are mapped to User Default Roles for WebFOCUS 8.2 Version 04, with appropriate privileges enabled or disabled. For example, Run Only Users and Power Users are both mapped to WF_Role_AnalyticalUser role in WebFOCUS 8.2 Version 04, but with different privileges enabled by security rules.

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