

Intellicus Upgrade from 7.x to 16.x

Version: 16.0

intellicus

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Acknowledgements

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For details, visit: <http://www.intellicus.com/acknowledgements.htm>

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1 Introduction

Intellicus 16.x release introduced major functional changes in the product. However, Intellicus ensures that all reports and query objects you have designed in your earlier versions are fully supported in Intellicus 16.x.

We recommend to read and understand this document and perform one round of upgrade rehearsal in a test environment before doing it in the production environment.

You must have administrator privileges on the machine on which Intellicus is being upgraded. You may need to refer the respective installation guides at various stages of the upgrade process.

The upgrade process consists of the following steps:

1. Backup previous version of Intellicus
2. Un-install previous version of Intellicus
3. Install new version of Intellicus
4. Restore previous version files like templates, configuration etc. (if applicable)
5. Start new version of Intellicus

The uninstall process retains few files and folders in Intellicus and does not delete them unless manually deleted.

Ensure that the newly installed Intellicus points to the same old repository database as its repository. During its first boot up, the new version of Intellicus report server automatically upgrades the repository schema and also upgrades all the objects to make them compatible with new Intellicus. This is a non-reversible action. In case you decide to go back to previous version you must use the backed up repository database.

As an alternate process, you can use Intellicus CAB file deployment mechanism. The steps are as follows:

1. Install new version of Intellicus on a new machine
2. Create cab file of all the objects from old Intellicus using iPackager
3. Deploy the objects on new Intellicus using CAB deployer

This process may not bring some objects to new system. They are: i) Saved reports, ii) Logs, iii) Audit data

2 Backup Intellicus 7.x

You must take full backup of Intellicus installation folder and of the Intellicus repository database before starting the upgrade process. Intellicus repository database stores all the reports, query objects and other user preference information.

System Files

Let us take a look at some of the system files that may help with the backup during the upgrade process.

License

Intellicus license file is located at:

<installation folder>\Intellicus\ReportEngine\bin\

When you upgrade to the new major version, it is mandatory to upgrade your license too. You may need to send your old license to the Intellicus sales representative to request for a new upgraded license file. You also need to renew Intellicus product support contract in case it is expired.

Connection Configurations

Intellicus connection configurations file Encr_ReportEngine.dat is placed at:

<installation folder>\Intellicus\ReportEngine\Config\

This file needs to be backed up for report server to connect to all the databases that were configured earlier.

Resource Bundles File

Purpose: This is the resource bundler file that contains entries on how the report output should appear in a specific language

Path: <installation folder>\Intellicus\ReportEngine\resourcebundles\en_US.xls

Language Bundles File

Purpose: This is the language bundler file that contains entries on how the portal should appear in a specific language

Path: <installation folder>\Intellicus\Jakarta\webapps\intellicus\client\lang\en_US.xls

You need to backup any other bundler file, if exists.

Report Engine Property File

Purpose: Stores Report Engine boot up configurations

Path: <installationfolder>\Intellicus\ReportEngine\config\ReportEngine.properties

Method: Take a backup of previous version report engine properties. Installing new Intellicus overwrites this file.

Post-installation, merge the property values which you have specifically changed in your installation.

Report Client Property File

Purpose: Stores Report Client (web application) configurations

Path: <installationfolder>\Intellicus\Jakarta\webapps\intellicus\client\config\ReportClient.properties

Method: Take a backup of previous version report client properties. Installing new Intellicus overwrites this file.

Post-installation, merge the property values which you have specifically changed in your installation.

Configuration Files

The following files should be backed up. Using these backed up files you can re-configure application behavior of respective areas.

EXTENDED INPUT VALIDATION CONFIGURATION

Purpose: Extended input validation prevents "SQL Injection" as well as expands scope of user input validation. Backup these files if you have customized this file

Path: <installation folder>\Intellicus\ReportEngine\config

File: exin_validations.xls

FORMATTING

Purpose: Backup these files if you have customized this file in case of any date formatting changes

Path: <installation folder>\Intellicus\ReportEngine\config

File: formatmapping.xls

DATABASE MAPPING

Purpose: To map date and time fields in Intellicus with their respective database fields

Path: <installation folder>\Intellicus\ReportEngine\config

File: databasemapping.xls

Other Folders and Files

The following folders and files should be backed up for any case of recovery. Each folder location and purpose of the files is mentioned below.

RPG

Purpose: Retains all published reports

Path: <installation folder>\Intellicus\ReportEngine\rpg

DATA

Purpose: Retains H2 database content. In case repository is set to HSQLDB or H2, then this folder contains all your repository content including reports and query object definitions

Path: <installation folder>\Intellicus\ReportEngine\data

CUBEDATA

Purpose: Retains built cube data

Path: <installation folder>\Intellicus\ReportEngine\cubedata

MAILS

Purpose: Stores mailer templates for system-generated emails

Path: <installation folder>\Intellicus\ReportEngine\Config\messages\mails

TEMPLATES

Purpose: Stores the template files for ad hoc reports

Path: <installation folder>\Intellicus\ReportEngine\templates

3 Uninstalling Intellicus 7.x

Windows:

Below are the steps to un-install Intellicus on Windows platform.

To stop Intellicus Report Server and Web Server

To stop report services, click Start > All apps > Intellicus > Service Manager and stop Intellicus Report Server and Web Server services. This will stop Report Server and Web Server.

Alternately, to stop Intellicus Report Server and Web Server from shortcuts, click Start > All apps > Intellicus and then click the respective shortcut.

Note: Stop all the other applications which are using Intellicus.

Uninstall Intellicus

Steps to uninstall Intellicus are provided in InstallingIntellicusOnWindows.pdf.

This file is placed at path:

<installation folder>\Intellicus\docs\Manuals\

Delete files and folders

Uninstall program may not delete some of the files and folders. You need to manually delete the following files/ folders.

Files:

For Windows XP / Windows 2003:

- C:\WINDOWS\system32\IntellicusEngineService.exe
- C:\WINDOWS\system32\IntellicusEngineService.ini

For Windows 2000:

- C:\WINNT\system32\IntellicusEngineService.exe
- C:\WINNT\system32\IntellicusEngineService.ini

Note: For newer versions of Windows, you need not manually delete the above mentioned files since system deletes these automatically.

Folders:

- **Intellicus\Jakarta** folder contains old compiled class files and old tomcat server. If this folder is not removed, Intellicus may continue using old files to give un-expected results or errors.

Delete **Intellicus\Jakarta** folder. Path of this folder is:

<installation folder>\Intellicus\

- **Intellicus\jre** folder contains java runtime. If this folder is not removed, Intellicus may continue using old files to give un-expected results or errors.

Delete **Intellicus\jre** folder, if exists. Path of this folder is:

<installation folder>\Intellicus\

- **Intellicus\ReportEngine** folder contains old log files and other property files. If this folder is not removed, Intellicus may give un-expected results or errors.

Delete **Intellicus\ReportEngine** folder. Path of this folder is:

<installation folder>\Intellicus\

- **Intellicus\Studio** folder contains old log files and other property files. If this folder is not removed, Intellicus may give un-expected results or errors.

Delete **Intellicus\Studio** folder. Path of this folder is:

<installation folder>\Intellicus\

Linux / Solaris:

Below are the steps to un-install Intellicus on Linux / Solaris.

To stop Intellicus Report Server

Run the file shutdown.sh. This file is available in Intellicus/reportengine/bin folder.

```
./shutdown.sh
```

To stop Intellicus Web Server

Run the file shutdown.sh. This file is available in Intellicus/jakarta/bin folder.

```
./shutdown.sh
```

After stopping the report server and web server, remove Intellicus folder.

Please refer InstallingIntellicusOnLinux.pdf and InstallingIntellicusOnSolaris.pdf for more information.

These help documents are placed at: <installation folder>/Intellicus/docs/Manuals/

4 Installing Intellicus 16.x

Steps to install Intellicus are provided in the following documents.

Windows:

InstallingIntellicusOnWindows.pdf

This file is placed at path:

<installation folder>\Intellicus\docs\Manuals\

Linux:

InstallingIntellicusOnLinux.pdf

This file is placed at path:

<installation folder>\Intellicus\docs\Manuals\

Solaris:

InstallingIntellicusOnSolaris.pdf

This file is placed at path:

<installation folder>\Intellicus\docs\Manuals\

Note: Restart the machine after installation is complete.

5 Restoring 7.x configurations

After installing Intellicus 16.x, you need to perform certain steps to re-apply old Intellicus custom configurations.

Note: Please stop Intellicus Report Server or Intellicus Portal before restoring the configuration.

Replace the contents of “data” folder

Place the backed up contents of “data” folder at path:

Windows:

<installation folder>\Intellicus\ReportEngine\

Linux / Solaris:

<installation folder>/Intellicus/reportengine/

Note: Replace the “data” folder only if one of the data connection points to H2 based DemoRepositoryDB.

Replace the modified template files

Place the backed up contents of template files at path:

Windows:

<installation folder>\Intellicus\ReportEngine\templates\

Linux / Solaris:

<installation folder>/Intellicus/reportengine/templates/

Note: You need to replace these files only if the templates have been modified/customized.

Restoring resource bundles

Merge and replace the resource bundles folder at following location:

Windows:

This folder is placed at path:

<installation folder>\Intellicus\ReportEngine\

Linux / Solaris:

This folder is placed at path:

<installation folder>/Intellicus/reportengine/config/

Restoring en_US.xls

If you have modified “en_US.xls” language bundler file then you need to merge those changes in latest language bundler file present at path:

Windows:

<installation folder>\Intellicus\Jakarta\webapps\intellicus\client\lang

Linux / Solaris:

<installation folder>/Intellicus/jakarta/webapps/intellicus/client/lang

Note: Restore and merge all other bundler files present at the above location in case you have created custom bundler files.

The below table lists the restoration files used in Intellicus:

Configuration/File	Type of Restoration
Encr_ReportEngine.dat	Restore old file
RPG folder	Restore old folder
Data folder	Restore old folder
Cubedata folder	Restore old folder
Mails	Restore old folder
Template files	Merge custom changes into newly installed templates
Resource bundler files	Merge custom changes into newly installed bundler files
Localeconfiguration.xls	Merge custom changes into newly installed locale configuration file
ReportEngine.properties	Merge custom changes into newly installed report engine properties file
CategoryPropertiesInfo.xml	Successful installation of Intellicus ensures that the newly installed file prevails
QOPropertiesInfo.xml	Successful installation of Intellicus ensures that the newly installed file prevails
ReportPropertiesInfo.xml	Successful installation of Intellicus ensures that the newly installed file prevails
exin_validations.xls	Merge custom changes into newly installed validations file
FormatMapping.xls	Merge custom changes into newly installed format mapping file

databasemapping.xls	Merge custom changes into newly installed database mapping file
ReportClient.properties	Merge custom changes into newly installed report client properties file

6 Starting Intellicus 16.x

Windows:

To start report services, go to the Service Manager and start Intellicus Report Server and Web Server services. This will start Report Server and Web Server.

To start Intellicus Report Server and Web Server from shortcuts, click Start > All apps > Intellicus and then click the respective shortcut.

Linux / Solaris:

To Start Intellicus Report Server

Intellicus Report Server is located in the /Intellicus/reportengine/bin folder. To start the Report Server, run the file run.sh.

```
./run.sh
```

To Start Intellicus Web Server

Intellicus Web server is located in the /Intellicus/jakarta/bin folder. To start the Intellicus Web server, run the file startup.sh.

```
./startup.sh
```

7 Post Upgrade Checklist

After both the report server and web server have started, carry out some checks to ensure that Intellicus has been successfully upgraded to 16.x.

Check for users

Check by login process or from Navigate > Administration > Manage Users that:

Intellicus has retained and migrated all the user details - user logins, access rights, privileges and single sign on mapping information.

Check for report layouts

Check by navigating Explorer or from Navigate > Repository > Manage Folders and Reports that:

Intellicus has imported all the report layouts (report layouts along with folders /categories).

Check for saved reports and report objects (Query Objects, Parameter Objects and Analytical Objects)

Check by navigating Explorer that:

Intellicus has retained all the saved reports and report objects.

Check for database connections

Check from Navigate > Administration > Configure Databases that:

Intellicus has retained all the previously created database connections.

Check for schedules

Check from Navigate > Schedule > Jobs that:

Intellicus has imported all the saved schedules.