Upgrading Intellicus from 4.x to 7.x

Intellicus Enterprise Reporting and BI Platform

Enterprise Reporting and
Business Insights Platform

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Acknowledgements

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

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

Contents

Introduction

Intellicus v4.x and v7.x releases introduced major functional changes in the product. But Intellicus ensures that all reports and query objects you have designed in your earlier versions are fully supported. Unless specifically mentioned all reports behave the same or better, in case enhanced. There are no report controls or properties that are deprecated.

There are major changes in certain other features. Some of those changes are handled gracefully during the upgrade process.

This document lists all those cases where Intellicus automatically upgrades your previous version objects and also deprecated features, if any.

Please read this document carefully before upgrading your production server with version 4.x or below to 7.x or higher.

The upgrade process consists of 3 steps
1) Un-install previous version of Intellicus
2) Install new version of Intellicus
3) Start new version of Intellicus

Note that you must take full backup of Intellicus installation folder and of the Intellicus repository database before starting step 1. Intellicus repository database stores all the reports, query objects and other user preference information.

Uninstall process retains few files, and does not delete them unless specifically mentioned in respective install document.

Ensure that 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 makes 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 go as:

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) S a v e d reports, ii) Logs, iii) Audit data

Functional Changes

Dashboards

Intellicus 4.x dashboards are fully depreciated from 7.x onwards. Dashboards created in 4.x will not be visible in 7.x onwards. You will need to create new dashboards afresh using the same base reports used in them.

Dashboards 7.x onwards are now faster to create, compact, more intuitive and allow more interactions. Dashboard designer and Dashboard Viewer screens have been merged to single screen and a concept of widgets are introduced. The Dashboards are now designed using widgets.

System Privileges

In Intellicus 4.x, System Privileges of i) Category Setup, ii) Data Admin and iii) Batch Scheduler Administrator was applicable to global level.

In Intellicus 7.0 onwards, Super Administrator can define the scope of System Privileges given to user at the level a) Organization or b) Global.

Figure 1: Manage User/Role

> **Note:** In Intellicus 7.0, System Privileges given in previous versions will be set with Organization scope. You need to change the scope to Global if the privilege for that user should be applied at system level.

Access Rights

In Intellicus 4.x or below there were separate pages for Access Control and Report Access Rights. The rights were with user as focus. The flow was i) Select a user, ii) select the object and iii) grant or revoke rights.

Intellicus 7.0 onwards the access rights pages are merged. The new flow is i) Select the object ii) Select one of the a) Every One, b) Organization or c) User and iii) Grant or revoke access rights

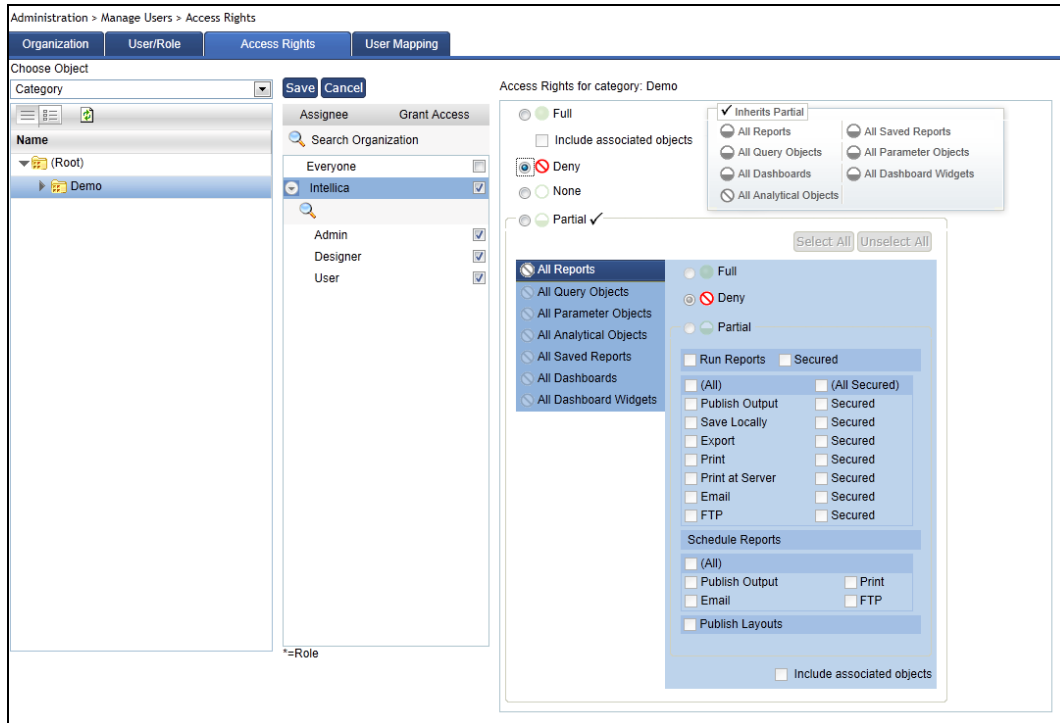From this single page you can provide Access Rights to all entities:

Figure 2: Manage Access Rights

During upgrading process (at first boot up run after new install), Intellicus automatically converts all previous user to report access rights to the new user access rights model. You will see all your previously set access rights in the new screen with same rights granted.

Categorization of Repository Objects

In Intellicus 4.x, categorization was available for reports only.

Intellicus 7.0 onwards supports categorization of all repository objects. Also you can create multi-levels of categories (folders).

After the upgrade, the Report Objects created in previous versions will be available on the root folder. You may move these to respective folders as per your requirements.

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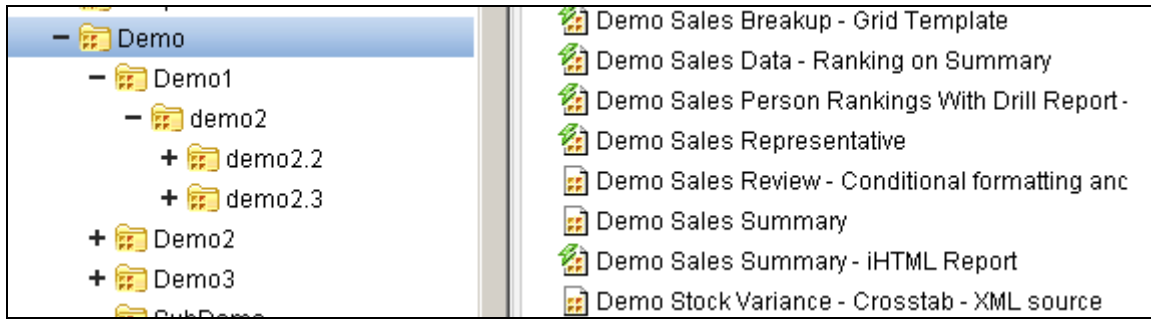

Figure 3: Categorization of Report Objects

System Files

License

Intellicus license is placed at

```
<installation folder>\Intellicus\ReportEngine\bin\
```

When you upgrade to new major you will need to upgrade your license too. You may need to send your old license to your Intellicus sales rep to request a new upgraded license file.

Connection Configurations

Intellicus connection configurations file encr_reportengine.dat is placed at

```
<installation folder>\Intellicus\ReportEngine\Config\
```

Do not over write this file during installation or restore from your backup. Using the old file report server will connect to all the databases that were configured earlier.

In case this file reportengine.dat file (apart from encr_reportengine.dat) exists in the same folder you must delete and destroy reportengine.dat for data security purposes.

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. There are no changes in these folders unless specified.

RPG

Purpose: Retains all saved report snapshots

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

MAILS

Purpose: Stores mailer templates

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

ADHOC TEMPLATES

Purpose: Stores Ad hoc template files

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

REPORT ENGINE PROPERTY FILE

Purpose: Stores Report Server Boot Up
Configurations

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

Method: Take a backup of previous version reportengine.properties. Installing new Intellicus allows it to overwrite this file.
Merge the property values of which you have made any changes specifically in your installation.

LANGUAGE BUNDLES

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

File: You may need to merge your customized en_US.xls entries into the newly installed file.

CONFIGURATION FILES

Purpose: Configuring behaviour of respective areas

Extended Input Validation configuration

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

Backup these files, if exists, in case you have customized this file

File:
exin_validations.xls

Formatting

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

Backup these files, if exists, in case you have customized this file

File:
formatmapping.xls

Database mapping

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

Uninstalling Intellicus 4.x

Windows

Here are the steps to uninstall Intellicus 4.x installed on Windows:

Stop Intellicus services

1. Right-click **Intellicus Report Server** icon appearing on system tray.

2. A context menu appears.
   i. Click **Exit** option.
   ii. The Service is stopped and the **Intellicus Report Server** icon is removed from the system tray.

   OR

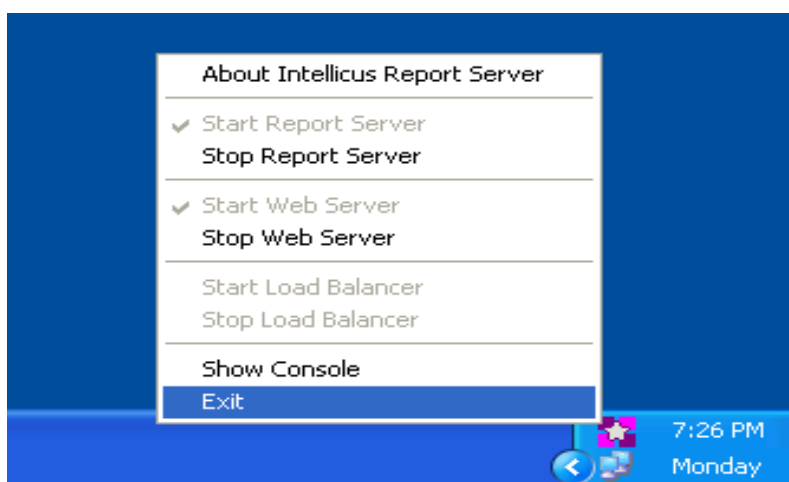   Stop Intellicus Report Server and Intellicus Portal if they are running using shortcuts.

Figure 4: Stop Intellicus Services

> **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

Files

Uninstall program may not delete some of the files and folders. Delete following 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

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

Here are the steps to un-install Intellicus from Linux / Solaris:

To stop Intellicus 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 path:

```
<installation folder>/Intellicus/docs/Manuals/
```

Installing Intellicus 7.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.

Restore 4.x configurations

After installing Intellicus 7.x, take these steps to re-apply old Intellicus custom configurations.

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

Restoration points and Restore types

Configuration/File	Type of restoring
Encr_reportengine.dat	Restore old file
RPG folder	Restore old folder
Data folder	Restore old folder (See warnings below)
Mails	Restore old folder
Template files	Merge custom changes into newly installed templates (See warnings below)
Resource bundler files	Merge custom changes into newly installed bundler files (See warnings below)
ReportEngine.properties	Merge custom changes into newly installed report engine properties file
CategoryPropertiesInfo.xml	Ensure Newly installed file prevails
QOPropertiesInfo.xml	Ensure Newly installed file prevails
ReportPropertiesInfo.xml	Ensure 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

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 HSQLDB database.

Warning: The new default repository is based on H2 database as compare to older which was designed on HSQLDB Database. New repository folder structure is also different as compare to older one. For using old repository, user needs to add old ReportEngine.dat file. Old ReportEngine.dat file will not work on new repository unless it has connections for accessing new repository.

Replace the modified template files

Templates files are available at path (on server):

Windows

```
<installation folder>\Intellicus\ReportEngine\templates\adhoc
```

Linux / Solaris

```
<installation folder>/Intellicus/reportengine/templates/adhoc
```

> **Note:** You need to replace these files only if these files were modified to change adhoc template.

Restoring resource bundles

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

Starting new Intellicus

Windows

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

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

Linux / Solaris

To Start the Report Server

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
```

Post Upgrade Checklist

After the report server and web server starts, carry out some checks to make sure Intellicus is successfully upgraded to 7.x.

Check for Users

Check by login process or by user management screen 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 folders and reports list and explorer that:
Intellicus has imported all the report layouts (report layouts along with folders /categories).

Check for saved reports

Check by viewing previous created report snapshots that:
Intellicus has retained all the saved reports and the viewing is compatible.