

BEST PRACTICES FOR UPGRADING SAP BUSINESSOBJECTS BI 4.0

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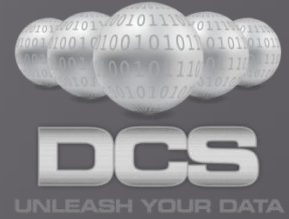


Condensed and updated from SAP's
"SAP BUSINESSOBJECTS 4.0 -
MIGRATION BEST PRACTICES"

Agenda

- ▣ DCS Federal Introduction
- ▣ Upgrade Overview and Concepts
- ▣ Upgrade Best Practices
- ▣ Technical Implementation

DCS Consulting



Unleash
Your
Sleeping
Data



Upgrade Overview and Concepts



Why Upgrading?

Data access

- Better integration with SAP BW
- New dimensional semantic layer
- Multi-source universe

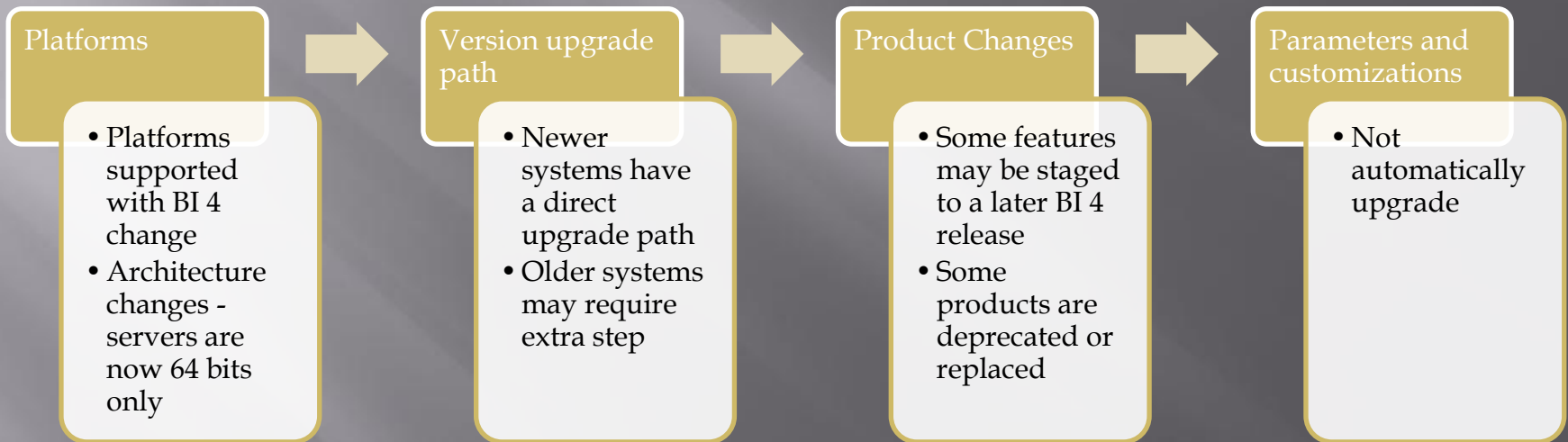
Usability / Productivity

- Harmonized user experience across the suite
- Interoperability
- Advanced analytical insight
- Brand new search capability

Cost of Ownership

- Integrated platform monitoring
- Advanced auditing capabilities
- Supportability and root-cause analysis
- 64 bits server architecture

Checklist - System Consideration



Brief Survey

of people currently running BOE 4.0

of folks looking to migrate in the next 6 months to 4.0

of folks still running XI R2 or older

of folks using Desktop Intelligence

General Considerations



Prior to upgrading do a license & hardware review

- 4.0 min hardware requirements - 4 CPU, 8GB - 16gb of memory



Refresher training for end-users to get comfortable with the new interface



If migrating AD security ensure that you're running SAP 4.0 SP02 Patch 10

- address a couple of issues with migration of AD security



32bit / 64bit Database connections

- 32bit Universe & Crystal Reports
- 64bit CMS/Audit/UNX

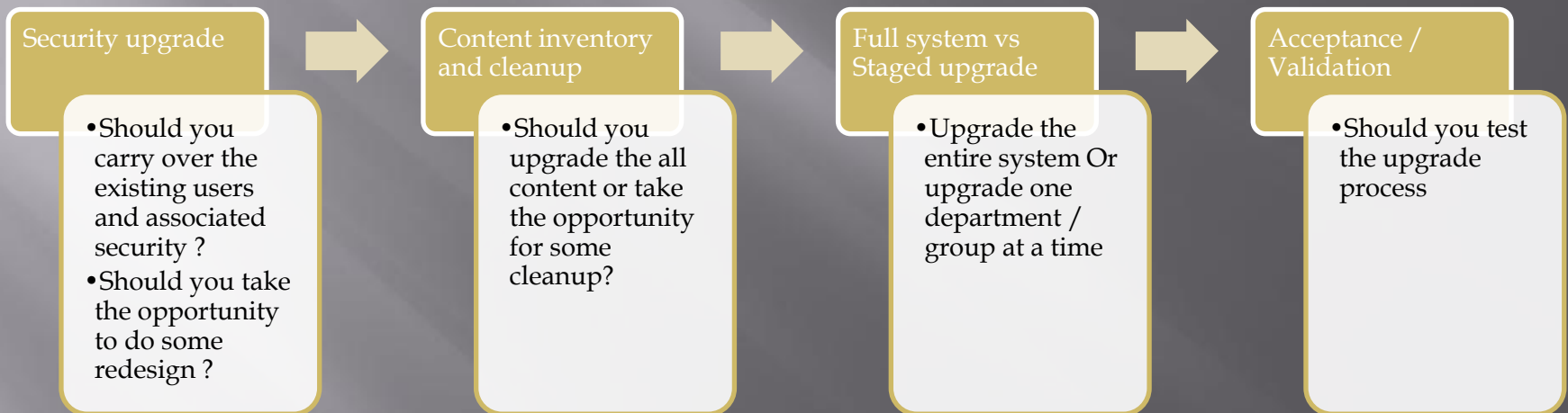


Look at breaking out the APS & ADJ server in 4.0

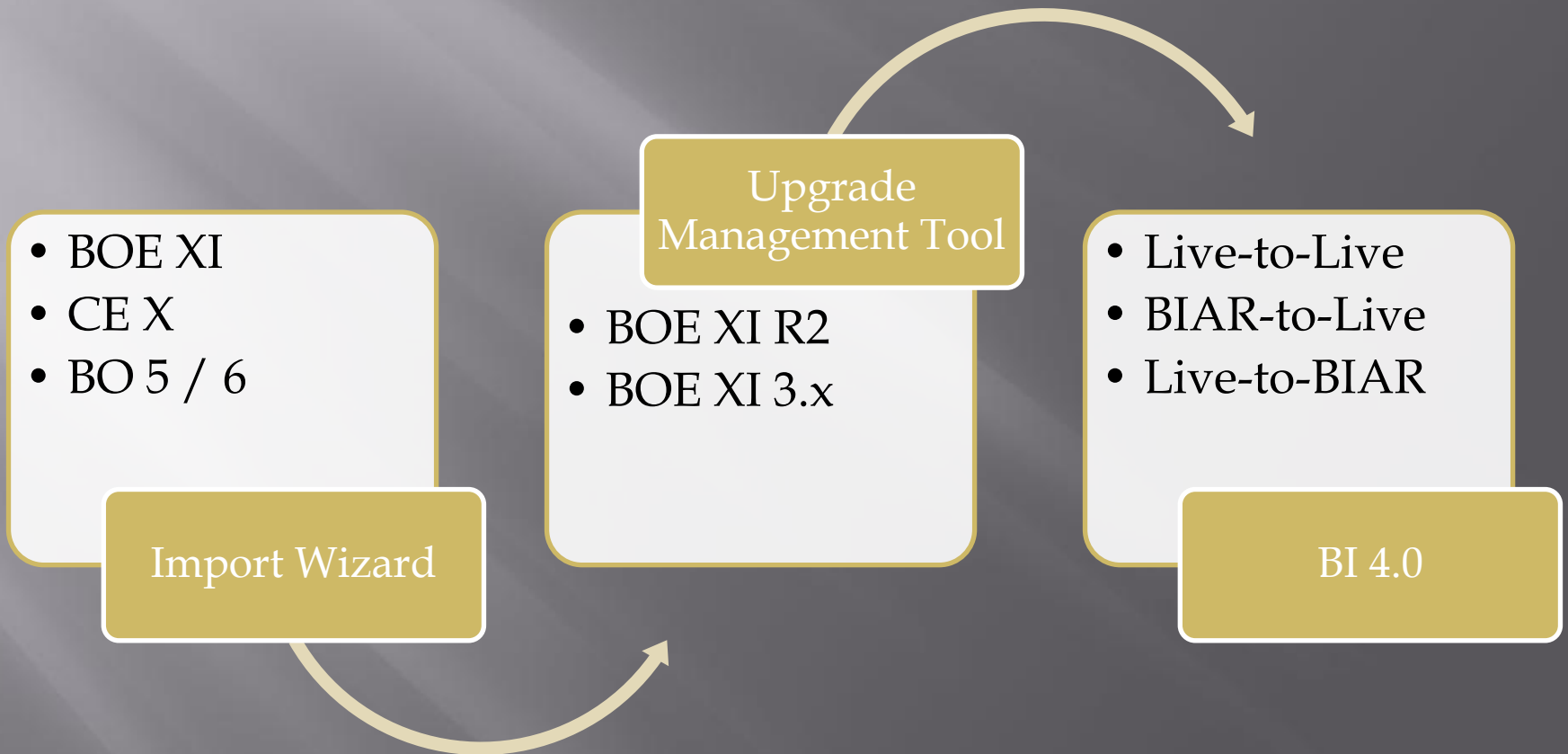


Look at breaking out the APS & ADJ server in 4.0

Checklist - Content Considerations



Versions Upgrade Path



Upgrade Best Practices



Product Changes - BI Platform Component

| XI R2 / XI 3.1 | BI 4.0 | Upgrade Consideration |
|----------------------------|----------------------------|--|
| Binaries | New Binaries | <ul style="list-style-type: none"> • Complete re-install required |
| Audit | New audit schema | <ul style="list-style-type: none"> • No compatibility with historical data |
| InfoView | Now "BI Launch Pad" | <ul style="list-style-type: none"> • New interface • Report pinning |
| Dashboard Builder | Now "BI Workspace" | <ul style="list-style-type: none"> • Corporate, Personal and My InfoView Dashboards become BI Workspaces but some analytics must be recreated |
| Encyclopedia / Discussions | End of Life | |
| Performance Manager | End of Life | |
| Search | Enhanced Search capability | <ul style="list-style-type: none"> • Includes a search index |

Product Changes - BI Client

| XI R2 / XI 3.1 | BI 4.0 | Upgrade Consideration |
|----------------------|---------------------------|---|
| Crystal Reports | CR 2011 and CR Enterprise | <ul style="list-style-type: none"> • All reports are by default upgraded to CR 2011 • Possible manual upgrade to CR Enterprise |
| Desktop Intelligence | End of Life | |
| Xcelsius 2008 | Dashboards | <ul style="list-style-type: none"> • Flash files will continue to work • Conversion to new format is optional • Conversion adds new features (globalization, UNX queries...) |
| Explorer | No Universe Support | <ul style="list-style-type: none"> • Information Spaces based on Excel are upgraded, the ones based on UNV and bookmarks are not ! |
| Voyager | Analysis, edition for OLA | <ul style="list-style-type: none"> • Some of workspaces will be upgrade to Advanced Analysis, the others require manual changes |
| Web Intelligence | Web Intelligence | <ul style="list-style-type: none"> • Fully upgraded |

Product Changes - BI Clients - Semantic Layer

| XI R2 / XI 3.1 | BI 4.0 | Upgrade Consideration |
|--------------------------------|---|---|
| Universe Designer - UNV format | No Change to Universe Designer - UNV format | <ul style="list-style-type: none">• None, universes and designer as in XI 3. |
| | Information Designer - UNX forma | <ul style="list-style-type: none">• Relational UNV can be converted to UNX• OLAP UNV have to be re-created in UNX (future version will support conversion) |

Product Changes - Tools

| XI R2 / XI 3.1 | BI 4.0 | Upgrade Consideration |
|---------------------|-----------------------------------|--|
| LCM (XI 3.1 only) | Integrated in BI 4.0 | <ul style="list-style-type: none">• None |
| Report Conversion | No change | <ul style="list-style-type: none">• Same feature as in XI 3.1 with the support of the Online to Online mode |
| Translation Manager | Integrated in BI 4.0 client tools | <ul style="list-style-type: none">• Parity of features with XI 3.1 is maintained• All translations previously done will be retained |
| WDeploy | Integrated in BI 4.0 | <ul style="list-style-type: none">• WDeploy GUI available |
| Voyager | Analysis, edition for OLAP | <ul style="list-style-type: none">• Some of workspaces will be upgrade to Advanced Analysis, the others require manual changes |
| Import Wizard | Upgrade Manager Tool | <ul style="list-style-type: none">• New tool |

Product Changes - Other Components

| XI R2 / XI 3.1 | BI 4.0 | Upgrade Consideration |
|--|--------------------------------|---|
| Integration Kits for SAP, PeopleSoft, Siebel, JD Edwards, Oracle | Integrated in BI 4.0 | <ul style="list-style-type: none"> • No separate installation require |
| Integration Kit for SharePoint | Integrated in BI 4.0 SP2 | <ul style="list-style-type: none"> • Same feature as in XI 3.1 with the support of the Online to Online mode |
| Data Federator | Partially integrated in BI 4.0 | <ul style="list-style-type: none"> • Existing DF 3.x deployments remain compatible with BI 4.0 |
| Live Office | No Change | <ul style="list-style-type: none"> • Existing documents will continue to work • Need to update client machine |
| Mobile | Integrated in BI 4.0 | <ul style="list-style-type: none"> • Local content moved with upgrade manager • 3.1 and BI 4.0 may coexist (2 client versions on the device) • Parameters to be re-set or copied |
| Query as a Web Service (QaaWS) | No Change | <ul style="list-style-type: none"> • QaaWS will continue to work • Upgrade Manager will detect dependencies to universes (UNV) • Dashboards on QaaWS will continue to work |

Security Upgrade

XIR2 > BI40

Continuity + new features have been added since XI R

- Set up rights at the root folder
- Specify the new “owner right” for existing products
- Specify rights with new products (WRC, IDT, LCM, etc)
- Simplify your security model by :
 - creating Custom Access Level
 - using selective enforcement of rights (Objects or Sub Object

XI3.1 > BI40

Security model is the same as the one of XI

- Specify the new “owner right” for existing products
- Specify rights with new products (IDT, LCM, etc)

Content Inventory and Cleanup

Upgrading content that is not needed increases risks and time to upgrade



Limiting the proliferation of universes and reports allows the business to be more efficient



Cleanup Tasks

- Fix or delete scheduled jobs that are paused or failed
- Detect and delete un-used reports after checking with users
- Remove older report instances or un-used instances
- Fix repository inconsistencies

Using Tools

Repository Diagnostic Tool

Instance Mngr / CMC

Auditing

Upgrade Mngr Tool

Full System vs Staged Upgrade

Full / One Shot Upgrade

Upgrade all content at once

Only 1 system to maintain

Requires lockdown of the entire system

Issues affect the entire system

Long downtime

Simpler (less options)

Stage / Incremental Upgrade per department

Upgrade content in stages

2 systems to maintain

Requires lockdown of department folder

Issues affect only the department upgraded

Short downtime

Acceptance / Validation

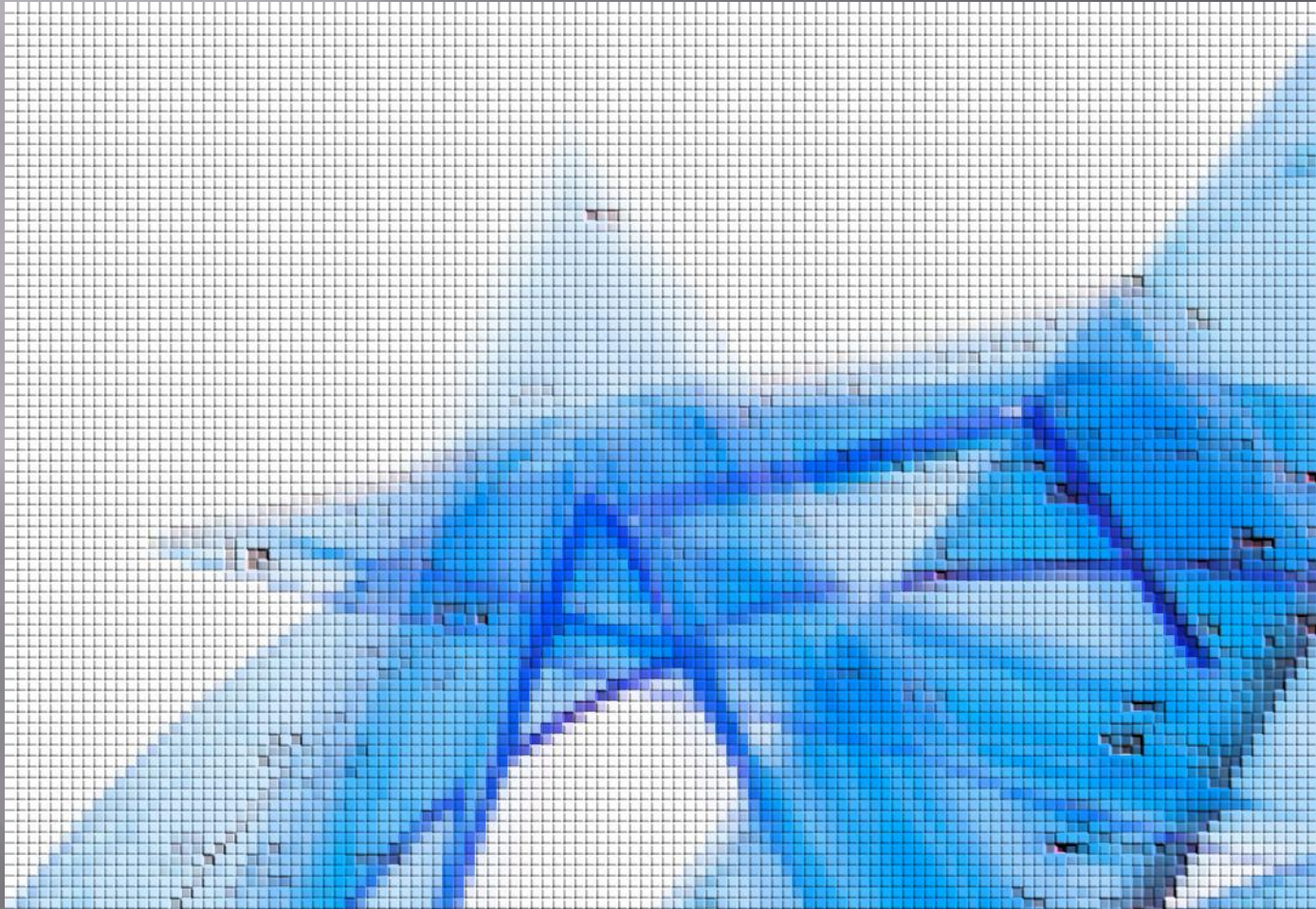
On a Sandbox

- Products features and functions
- Compatibility with existing systems
- Estimate time to upgrade
- Success of the content upgrade (users, security, universes, reports...)

In Place

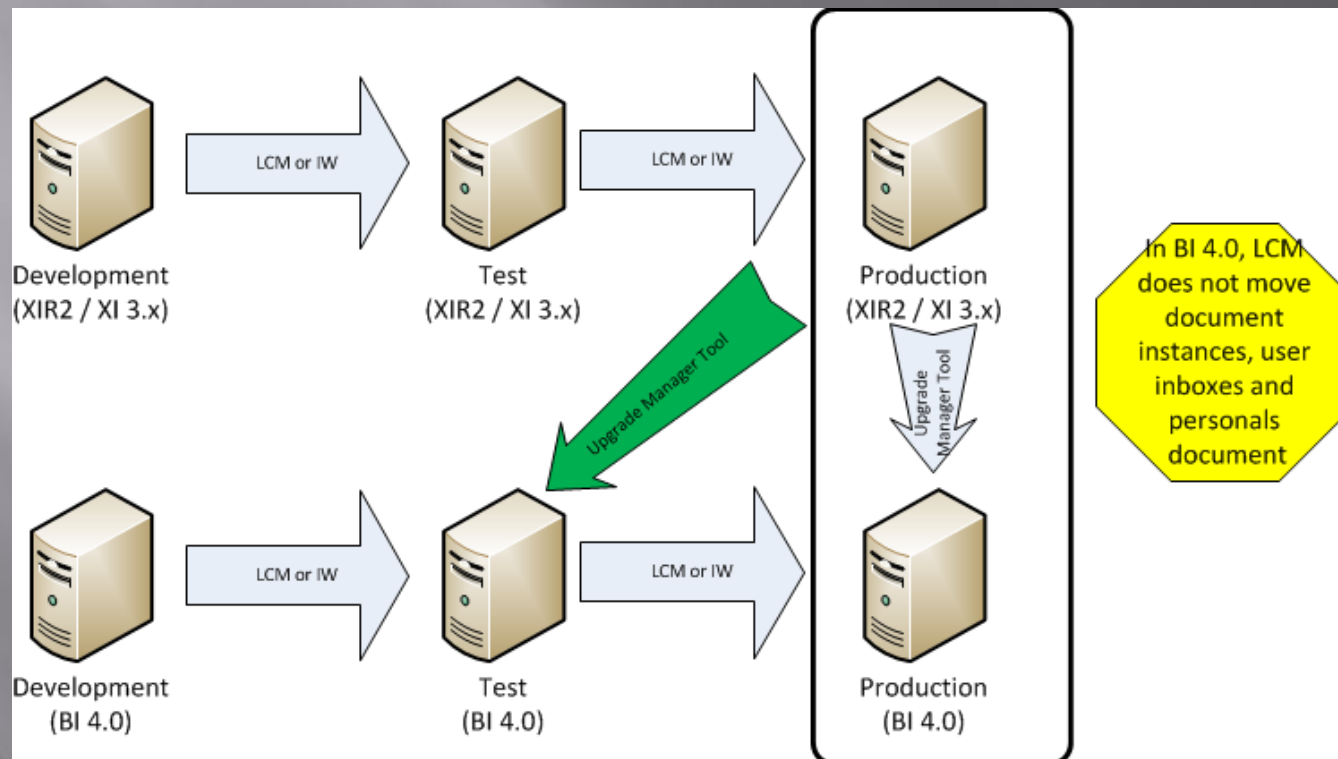
- Products features and functions
- Security model
 - critical folder & groups
 - top 10 most used
- BI Content
 - 50 documents most frequently used
 - 50 documents with longest refresh time
 - 5 most critical documents for power users and VIPs (Inboxes / Personals / Public Folders)
 - 10 universes most frequently use

Technical Implementation



Upgrade Considerations (DEV/ TEST / PROD

- Best practice: upgrade from previous version (XI R2 / XI 3.x) Production to BI 4.0 Qualification



- processed in a future minor release) may lead to: previous version (XI R2 / XI 3.x) Production to BI 4.0 Production

The right tool for the job in BI 4.0

Upgrade Management Tool

Upgrade: "Transport and transform content from previous version to newer version" Content includes all objects.

Improvement over previous releases: Now a unique and scalable tool dedicated to upgrade

Promotion LCM

Promotion: "Transport content from like system to like system"

Systems are the same major version e.g. Dev to Test to Production Content is primarily document templates and metadata and schedules. Not document instances

Upgrade Manager Live-to-Live Scenario

- ▣ Optimized for a large amount of objects. No intermediate step or Storage
- ▣ 2 ways (Incremental or Complete)
- ▣ Required to have source and destination systems up and running
- ▣ Ports must be opened between source and destination

Upgrade Manager BIAR-to-Live Scenario

- ▣ Needs to be used when the previous and new systems cannot be connected
- ▣ Allows to keep a snapshot of the content and possibly re-start the process from it
- ▣ Use small BIAR (10,000 objects, 1Gb max recommended)

Auditing

- ▣ Overview
 - Keep your XI 3.1 audit data and do reporting from BI 4.0 on it. And upgrade XI 3.x universes and reports.

- ▣ Audit solutions that use the XI 3.x audit schema :
 - Keep existing XI 3.x audit database for historical data
 - Move the XI 3.x audit application (universe + reports) into the new system
 - Start BI 4.0 with a fresh BI 4.0 audit database
 - Install the BI 4.0 sample audit universe and reports (found on the web site)
 - Customize the samples or re-develop reports to match XI 3.x and BI 4.0 needs
 - If continuity is needed: Create a multi-source universe and appropriate reports to get audit continuity before and after the upgrade

Desktop Intelligence

Overview

- ❑ Desktop Intelligence documents will no longer be available in BI 4.0 CMS.

How to convert Desktop Intelligence Document :

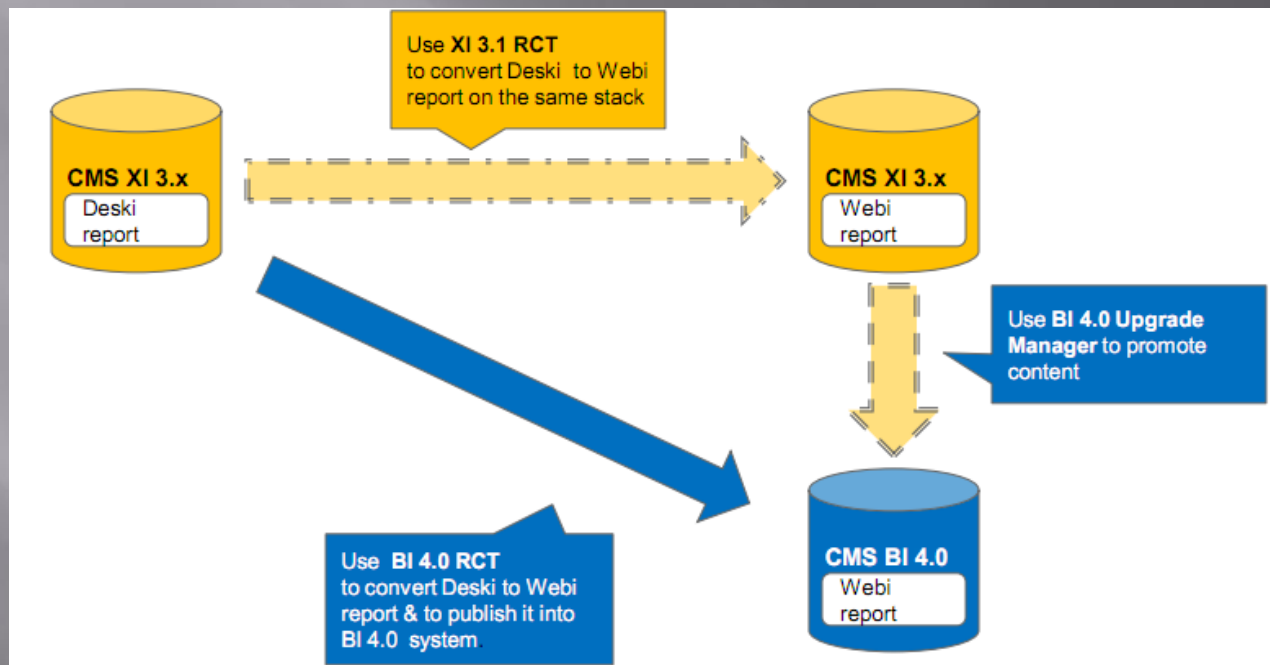
- ❑ Desktop Intelligence to Web Intelligence (convert with RCT)

New XIR2 & XI 3 Desktop Intelligence Features converted with RCT 4.0

- ❑ Query on Query
- ❑ Fold/Unfold
- ❑ Show/Hide
- ❑ Fit to page

Desktop Intelligence & Report Conversion Tool

- ❑ Desktop Intelligence documents will no longer be available in BI 4.0 CMS.
- ❑ The only way for a user to bring Desktop Intelligence content is



- ❑ Link to UNV is preserved
- ❑ CUID stay the same

Take Away

- Plan the upgrade
 - Upgrading is a demanding project. Need plan, milestones, backup and test strategies...
- Platforms / Product changes
 - Platforms supported with BI 4.0 may be different from your existing system
 - Some features may be staged to a later BI 4 release / some products are deprecated or replaced
- Content inventory and cleanup
 - Should you upgrade the all content or take the opportunity for some cleanup?
 - Upgrading content that is not needed just increases risks and time to upgrade
- Full system versus Staged upgrade
 - Shutdown the production system and upgrade it all or upgrade one application / group at a time
 - Validate the upgrade
 - Identify what needs to tested and execute a relevant testing campaign