

Deski to Webi Report Conversion

Presented by:
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Agenda

- Bio
- Why Conversion is needed
- Why Conversions can fail
- Planning a conversion (and Migration) strategy (7 phases, 16 steps).
- Using the RCT (Report Conversion Tool)
- Summary
- Q & A

Bio:

- **21 Years in I.T.** (Programming, ETL, Network-Integration, Project-Management, Support Desk)
 - Last 10 Years focus on Business Intelligence
- **4 years US Navy** (Operations Specialist)
- **MS Degree** (Computer Information Systems)

**Why should I convert my
Deski Reports??**

HERE LIES DESKI

B.O. CLAIMS IT WAS
JUST TO MESSY.



Reasons to convert to Webi

- End of Life has been established for Deski (BO 4.0 – 2011, BO Maint. continues on XI 3.x thru 2015).
- Webi (and Crystal) is now BO's preferred Reporting tool.
- Utilize new/addtl functions & capabilities.
- Quicker development time.
- Better Visualizations.
- Interoperablility (Excelsius, Dshbds, SBO Explorer, OLAP).

Rpt Conversion Failure Causes (XI R2)

- Functions existing in Deski but not in Webi.
- Functionality Gap is shrinking with new BO Versions and SP releases.

Function	Deski	Webi
Dynamic Images (object based)	Y	N
VBA/Macros	Y	N
Fit-to-page	Y	N
Custom Grouped Values	Y	N
Report variable based on LOV	Y	N
Hide Columns in a block	Y	N
Custom Breaks	Y	N
Table Folding	Y	N
Personal Data Provider (txt, xls, xml)	Y	N

Planning a migration/conversion strategy

1. Review existing BO Env. If converting from a pre-XI version (5.x, 6.x), then a Migration Plan is needed.
2. Compile a clear & measurable strategy (consider Bus Units, Folder hierarchy, Deski Rpts and respective Universes).
 - a. If overall Env and/or Rpts are too large & complex, then utilize attached Migration Status Spreadsheet.
3. Collaborate with Business Units & Report owners.
 - a. Review unconvertable subject matter (images, Freehand SQL, Folds, Groupings, etc.)
 - b. Focus on priority/most-important Reports first.
 - c. Personal Reports (saved in "My Favorites") should not be converted.
 - d. Good opportunity to archive old/unused rpts.
 - e. Identify a "pre-status" of Reports (Delete, Convert, Rebuild). If a Rpt is to be rebuilt, then discuss who will rebuild it (BU or IT).
 - f. Schedules are not converted w/reports.
 - g. Discuss development-freeze dates.
 - h. Discuss end-user Webi Training.

Sample Migration/Conversion Plan (7 phases, 16 steps)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1				Phase 1			Phase 2	Phase 3				Phase 4				Phase 5	Phase 6		Phase 7			
2	Bus Unit	BI Pmgr	A.A. Contact	A.A. Phone	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12	Step 13	Step 14	Step 15	Step 16	% Compl.	
3	ACTS	GC	Barker, Meg	555-1212	6/3/2008	6/3/2008	6/3/2008	6/3/2008	6/3/2008	6/3/2008	6/23/2008	6/23/2008	6/23/2008	6/23/2008	6/23/2008	6/23/2008	6/23/2008	6/26/2008	7/16/2008		99.90%	Sn
4	Fully Migrated %:																				0.00%	
5	Started but Uncompleted %:																				100.00%	
6																						
7	Step % Complete Values:				6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	6.66%	0.10%	100%
8																						
9	Phase and Step Descriptions																					
10			Phase 1	1. Meet with the customer to discuss they're current BO env. & overall Migration Plan. 2. Provide the Questionnaire to the Groups Area Admin person. 3. Discuss the BO Freeze Date & Duration (Freeze meaning no changes or additions can be made to a Groups Reports & Universes).																		
11			Phase 2	4. Open RFS to DBA to copy a Groups BO Schema from 6.1b Prod to 6.1b Dev (this phase takes approx. 1 week to complete).																		
12			Phase 3	5. Run the Import Wizard & Report Conversion tool. 6. Setup Groups Initial Testing Structure & Security (the 3 working Folders, and Area Admin Group). 7. Ensure all Universes & Connections are created & working (with proper XI Rights), and ensure the END_SQL custom parameter is added to each universe. 8. Users can begin Webi Training, and Testing/Validating/Fixing their Groups Reports (aka "T&V").																		
13			Phase 4	9. Help users with fixing converted Reports (Webi or Deski). 10. Provide BO Security Matrix Document to Area Admin. 11. Implementing the Group's final Folder Structure & Security Model in XI Dev. 12. Review final Security Model & proper CMC use with Groups Area Admin.																		
14			Phase 5	13. Audit Security (ensure Groups structure & security is solid and follows Disney's security & structure template).																		
15			Phase 6	14. Move Group from XI Dev to XI Prod. 15. Ensure all Universe Connections (in XI Prod) are created & working (with proper Rights assigned).																		
16			Phase 7	16. Disable Group within BO 6.1b (but only IF/WHEN ALL of that respective Groups original 6.1 Reports have been migrated, tested & validated successfully in XI).																		
17																						
18																						
19																						
20																						

Using the RCT (Report Conversion Tool)

- The Report Conversion Tool converts Desktop Intelligence XI reports to Web Intelligence XI reports and publishes the converted reports to the Central Management Server.
- The Report Conversion Tool does not convert all Desktop Intelligence features and reports. The level of conversion depends on the features that are used in the original report. Desktop Intelligence features that are not (yet) available in Web Intelligence are of course not converted.
- The Report Conversion Tool assigns a status to each report. Values are:
 - Fully Converted (published to CMS)
 - Partially Converted (published to CMS)
 - Not Converted (not published to CMS)
- Closely investigate documents that are “partially converted”. Although partially converted documents can be published to the Central Management Server, the result is sometimes completely different than the original document because the corresponding capability is not available in Web Intelligence.
- The Conversion results log provides information about reasons why reports are not converted.
- Does not convert/import schedules.

Select Report(s) needing to Convert

Report Conversion Tool - [gconklin-@ STLBOE3D]

Converted WID documents may display different values from the original REP document. Please see the Report Conversion

Folder Category Refresh

- Public Folders
 - Administration Tools (2)**
 - Deski_Test
 - Deski_Test (1)
 - test2
 - Administrative
 - Applications
 - Applications old
 - Auditor
 - Cardium Portal
 - CCMS Search
 - CCMS Web Assessment Reports
 - Census
 - CentAccount Reports
 - Claims Data Repository (CDR)
 - Corporate

Name	Folder
Deski_Test	Administration Tools

>> <<


Open list... Save list... Total selected: 1

Show unconverted documents only Convert documents containing free-hand SQL / stored procedures.

Next > Cancel Help

In process of converting Deski Rpt

Converting


Name	Current Status
Deski_Test	 Converting

1 / 1





Cancel

Completed Conversion

Conversion completed

Name	Current Status
Deski_Test	 Fully Converted

1 / 1

 1  0  0  0

Close

Conversion Result Screen

Report Conversion Tool - [gconklin-@ STLBOE3D]



Select the converted documents to publish. You can rename documents and change the publication folder and category.

Conversion Results

Fully converted	Partially Conve...	Not Converted
1 (100.0 %)	0 (0.0 %)	0 (0.0 %)

Open Audit Report...

Select the documents to publish. Right-click to display the actions menu.

<input checked="" type="checkbox"/>			Target Name	Source Name	Target Folder	Target Categories
<input checked="" type="checkbox"/>			Deski_Test	Deski_Test	Administration Tools	

< Previous

Next >


Cancel

Help

Publishing Result

 Publish status



Name	Current Status
Deski_Test	 Publish completed

1 / 1



1



0



Failed documents remain on the file server

Close

Conversion Result Log

Report Conversion Tool - [gconklin-@ STLBOE3D]



Conversion Complete. (4/4)

Conversion results

Fully Converted : Deski_Test

Return to Start



Exit

Help

Infoview Results

BUSINESSOBJECTS INFOVIEW

Home | Document List | Open ▾ | Send To ▾ | Dashboards ▾

  | New ▾ | Add ▾ | Organize ▾ | Actions ▾

Search title ▾

All	Title ^	Last Run	Type
My Favorites			
Inbox	 Deski_Test		Desktop Intelligence Report
Public Folders			
Administration To	 Deski_Test		Web Intelligence Report
Administrative			

Converting potential Failure Rpt

Report Conversion Tool - [gconklin-@ STLBOE3D]

Converted WID documents may display different values from the original REP document. Please see the Report Conversion Tool Guide for more details. (1/4)

Folder Category Refresh

- Public Folders
 - Administration Tools (2)
 - Deski_Test
 - Deski_Test_PDP
 - test2
 - Administrative
 - Applications
 - Applications old
 - Auditor
 - Cardium Portal
 - CCMS Search
 - CCMS Web Assessment Reports
 - Census
 - CentAccount Reports
 - Claims Data Repository (CDR)
 - Corporate
 - Data Files
 - Demand Management
 - Drill
 - EDI Management Reports
 - EDW Reconciliation
 - Enterprise Reports
 - EPSDT
 - EV Debugging
 - Executive Dashboard
 - Executive Dashboards
 - Feature Samples
 - FFS Customized Reports
 - Georgia - Peach State Health Plan

Name	Folder
Deski_Test_PDP	Administration Tools

>> <<


Open list... Save list... Total selected: 1

Show unconverted documents only Convert documents containing free-hand SQL / stored procedures.





Next > Cancel Help

Conversion status

Conversion completed

Name	Current Status
Deski_Test_PDP	 Not Converted: Detail variable

1 / 1

 0  0  1  0

Close

Conversion Result

Report Conversion Tool - [gconklin-@ STLBOE3D]



Select the converted documents to publish. You can rename documents and change the publication folder and category. (3/4)

Conversion Results

Fully converted	Partially Converted	Not Converted
0 (0.0 %)	0 (0.0 %)	1 (100.0 %)

Open Audit Report...

Select the documents to publish. Right-click to display the actions menu.

<input checked="" type="checkbox"/>			Target Name	Source Name	Target Folder	Target Categories
			Deski_Test_PDP	Deski_Test_PDP	Administration Tools	

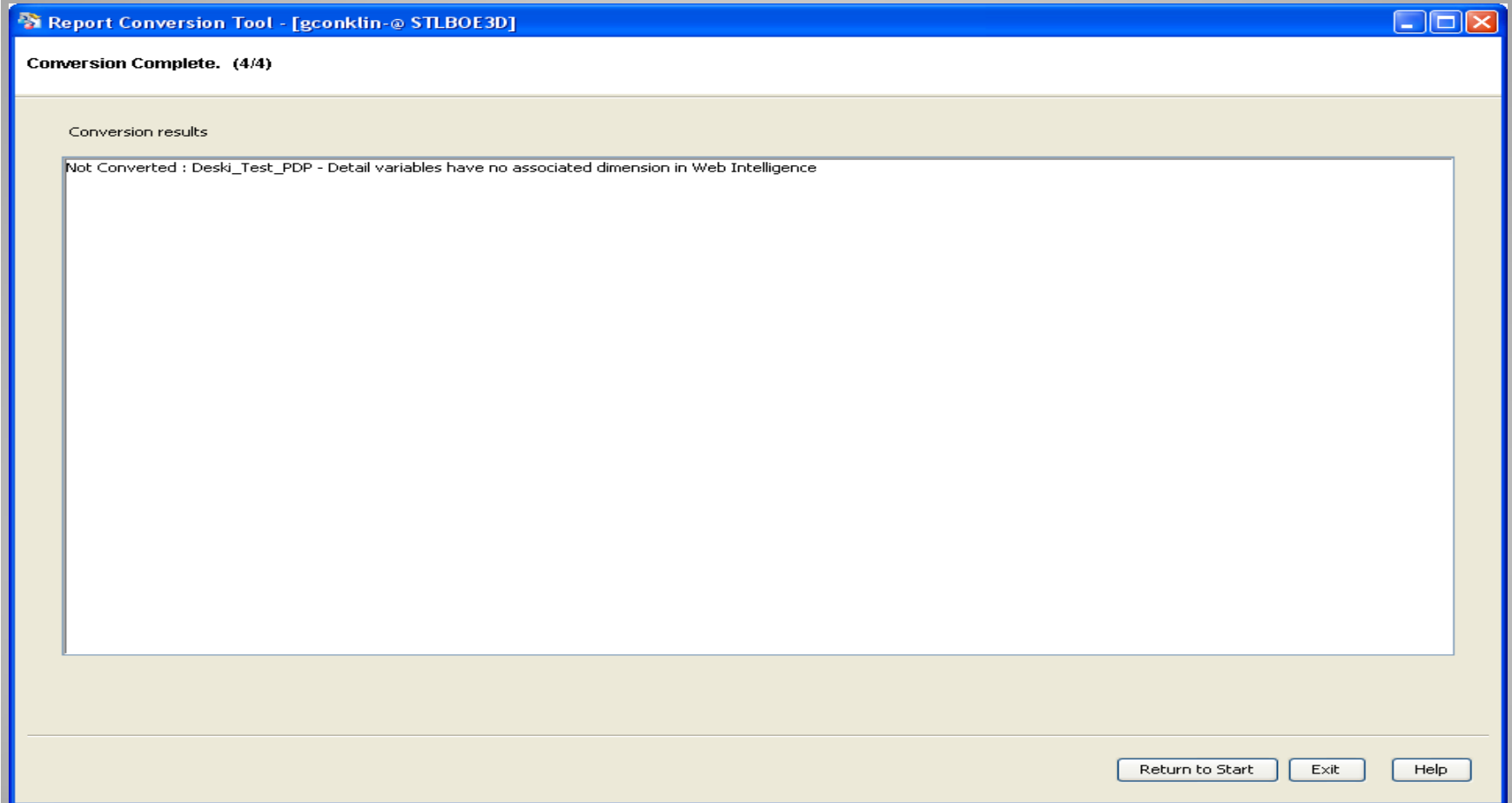
< Previous

Next >

Cancel

Help

The Conversion results log provides information about reasons why reports are not converted.



Summary

- Develop a Scope or Strategy Plan (and stick to it). If converting FROM a prior BO XI version (5.x, 6.x), then an Intrinsic Migration Plan is also needed.
 - The more effort and care spent in developing a Strategy and/or Migration Plan, the lower the risk and the greater the likelihood of a quick & successful Migration.
- There are no general rules to calculate the total effort needed for conversion and/or Migration. Many factors influence the time-line and costs for a migration and conversion:
 - Which release was involved? With every new release or service pack more items are migrated with fewer issues (hence, better success rates of full conversions).
 - The migration issues depend on the complexity and the features that were used in the report.
 - Are the original authors available for the conversion process? Deski reports can be difficult to maintain some aspects, such as identifying the synchronizations and calculations used.
 - The level to which the key personnel are devoted to the project.
 - Acceptance rate for differences: If a report is not 100% exactly the same as in the original version, what differences are accepted and what must be changed?
 - Inexperience with both Desktop Intelligence and Web Intelligence as well as the Report Conversion Tool.

• Q & A

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