Business Objects XI Migration - Metropolitan Council, UK

A Metropolitan Council is a user of Business Objects (BO) 6.1.5. The use of BO is spread around the business and constituted by users mainly using BO thick client reporter, universe designer and broadcast agent scheduler. Acuma were commissioned with migrating them from this version of Business Objects, to the latest version BOXI release 2.

The Challenge

The Council's desire to migrate from BO 6.0 mainly to utilise the more streamlined, web based functionality of BOXI and also utilise the more scalable and reliable service oriented architecture on which BOXI runs. This migration was what could have been considered a small migration, however, all the principles applied in this case study could be applied to larger migrations in equal measure.

Current system

Hardware

The BO6 system used ran on a single server, with all components running on this server. The customer had procured new hardware for the solution and so no parallel running on the same hardware was required.

Userbase

The BO userbase was spread between several departmental power users, report consumers and also 2 administrators. The power users and administrators all take responsibility for scheduling reports in broadcast agent, but general administration is performed by the 2 administrators only. All other report consumers were either people who receive reports generated by broadcast agent or some users which had access to thick client business objects to do basic in report analysis. The total userbase for interactive users was observed to be in the region of 30 to 40 users connecting to a variety of datasources.

It was seen that the accurate transfer of the scheduled reports was paramount as this was important for continuity.

The Solution

Acuma gave recommendations on the hardware\software required for the new system based on the council's current usage. This was relatively straight forward as the customer wanted to mirror what they had in BO 6. Acuma's recommendation was that all layers of the BOXI architecture should reside on a single server and this server be powerful enough to cope with a webserver and the numerous services that constitute a BOXI install. The server recommended was;

- 2 Dual Core Processors
- 4GB RAM

At least 100 GB hard disk space partitioned into a 20% - 80% ratio for system \ application disk space respectively. This size of server should be adequate for the amount of users and also to cope with running the scheduled reports.

Acuma migration process

Using BOXI tools, the migration process can be relatively simple and painless. However, early in the release of BOXI R1, Acuma identified that the main challenge in BOXI migration is not of the technology, but more of the process and people involved. BOXI should be considered a completely new product and so this effect on users must be considered. In addition to this, as this is a migration and not solely an upgrade, the testing of all BOXI content is paramount for success.

The Acuma migration process takes all these elements into account.

Scoping

Initially a review of the system that enables scoping on not only the time required to perform the migration but also the complexity of the migration and also to spot any areas where there may be problems. Also during the scoping period, it allows time to audit the current system and to remove any duplication in any object in the BO environment. There were several areas spotted during scoping which required review, these were;

- Several reports contained VBA Macros, an area which can often prove problematic.
- A high amount of BCA schedules were present which would require migration.

- There was a high amount of Universe duplication, bringing the possibilities that users could use the wrong universe.
- There were several highly formatted reports, which would require special attention, not only in the native formatting but also in any exported formatting (PDF etc).

This exercise then enabled Acuma to estimate the time required to migrate the current system but also enabled the creation of a suitable test plan on behalf of the customer.

Testing

Testing is quite possibly the most time consuming and important part of a migration. This council not only had limited resource for testing but also they wanted to get their BOXI system up and running in parallel with the BO6 system in a short time. Due to this, it was proposed that a testing matrix be used to identify a sample of reports that should be tested as a matter of importance. The following matrix was used;

	Complex	Medium	Simple
Mission Critical			
High Priority			
Medium Priority			
Low Priority			

Using this grid, reports were categorised by their complexity and also importance to the business and business users. After this study was done, it gave various benefits. Firstly, the simple - mission critical reports could be tested quickly and bring an amount of “quick wins” to the migration, and also the complex reports could be tested by users or administrators with more knowledge of the reporting tools. It also allowed the mission critical reports to be migrated before anything else and thus provide more instant value to the user base.

Such a testing methodology can bring focus to the testing efforts and be inbuilt into a project plan beforehand. In all cases, it was ensured that report performance was increased or similar and that results were the same.

Handover

In the case of a BO Classic to BOXI migration, the handover is key for smooth running of the system, mainly due to the high amounts of differences in the software. As with general Acuma practice, handover was performed during the migration progress with skills transfer to key users of the BO system. This approach works well as it allows an Acuma consultant to pass on experience and knowledge but also let the users apply this knowledge at the same time. In the case of this council, this skills transfer was done to the main administrator, who in this instance was also the main report developer.

Business Benefits

This migration was a success, mainly because all the “sticking points” of the migration process were known up front, and also the fact that a specific plan for the migration was followed. This allowed a coherent process which both Acuma and the customer could follow. In addition, the testing methodology described allowed a basic BOXI system to go live quicker than first anticipated with mission critical data as this content was identified up front, as apposed to during the actual migration process itself.

Finally, the skills transfer piece enabled the customer to support their own system once the migration had completed, with a smaller amount of reliance on Acuma's expertise. This also enabled the council to further filter knowledge of the new software through their organisation.