Innovationen und Mehrwert von BI 4.1 – Strategien und Tipps für den Upgrade

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Agenda

News and value drivers with BI 4.1

The Upgrade
- Upgrade Path
- Product changes and upgrade Considerations
- Checklist

Customer Story - Upgrade Challenges & Lessons Learned

How SAP can support you
News and value drivers with BI 4.1
Value Drivers of SAP BusinessObjects BI4.1

Native SAP HANA support

Mobile

Native SAP BW support

Reduced TCO

Designed to support future innovations

Focus on Quality

Upgrade Ready

Desk/I Compatibility
BI 4.1 is available since August 2013

- **KPI based Ramp up program ended 3 months early**
- **Very positive customer feedback**
  - "in the 15-yrs I've worked with BOBJ -- 4.1 is the best code release ever"…FedEx
  - “improvement in speed of the prompts in a Web Intelligence Report.“ Cascades
  - ……
- **Strength focus on quality**
We listened to our customers…

**Monitoring**
- Prevent downtimes and react quickly to problems

**Auditing**
- Audit in the BI platform needs to be simpler so teams can efficiently capture and leverage audit data.

**Import wizard and LCM**
- LCM needs to evolve towards enterprise class.

**Deployment and administration**
- Please simplify deployment and administration so more IT resources can be used to deliver business value

**Usage of BW queries**
- BI tools should be capable of leveraging them directly without the additional cost of a Universe.
Upgrade Scenarios
Versions Upgrade Path

No direct Upgrade
Go first to XI R2 or XI 3.x
Define a manageable scope

Planning

- Technical or functional?
- Identify a target
- Check your upgrade path
- Stay focused

Design
# Product Changes - BI Clients

<table>
<thead>
<tr>
<th>XI R2 / XI 3.1</th>
<th>BI 4.1</th>
<th>Upgrade Considerations</th>
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| Crystal Reports     | CR 2013 and CR for Enterprise | - All reports are by default upgraded to CR 2013  
                        |                                        | - Possible manual upgrade to CR Enterprise                                      |
| Desktop Intelligence| End Of Life             | - Report Conversion Tool converts into Web Intelligence format prior or after the upgrade  
                        |                                        | - Runnable with Desktop Intelligence Compatibility Pack (DCP) but with minimum deprecation of DeskI Client functionality |
| Xcelsius 2008       | Dashboards              | - Flash files will continue to work  
                        |                                        | - Conversion to new format is optional  
                        |                                        | - Conversion adds new features (globalization, UNX queries…)                   |
| Performance manager | End of Life             | - No upgrade                                                                           |
| InfoView            | BI Launch Pad           | - New interface  
                        |                                        | - Report pinning                                                              |
| Web Intelligence    | Web Intelligence        | - Fully upgraded                                                                       |
Checklist
Standard Upgrade Considerations

1 PLATFORMS

2 VERSION UPGRADE PATH

3 PRODUCT CHANGES

4 SECURITY UPGRADE

5 CONTENT INVENTORY AND CLEANUP

6 FULL SYSTEM VS STAGED UPGRADE
Customer Story

Upgrade Challenges & Lessons Learned
Lessons Learned & Customer Success Stories

Customer:
International Pharma in EMEA

Background:

- Customer deployed BOE XI 3.1 in 2010
- Upgraded 120+ projects using the shared environment (now over 200 using the new version)
- 66,000+ users, 2,500+ universes, tens of thousands of reports
- Started to evaluate BI 4 in Oct 2011
- Started testing upgrades from Sep 2012
- Incremental upgrades began in 2013 – three planned increments (Jan, Mar and Apr)
- Upgraded from XI 3.1 to BI 4.1
Lessons Learned & Customer Success Stories

Upgrade constraints:

- Downtime would only be allowed during the weekend (Sat 2am till Sun 8pm)
- There was to be no parallel running of versions for projects
- The project owners had to choose which upgrade wave they were in
- Each project has the chance to test how their content would behave after an upgrade
Lessons Learned & Customer Success Stories

Upgrade strategy used:

- Sandbox testing
- System / base security setup
- Wave / phased incremental approach
- Run reposcan in advance of first increment

Lessons Learned:

- Set up a migration test server
- Setup dedicated user on source system
- Utilize existing security model to control dependency calculations. Post upgrade, re-check security
- Get the fastest file share technology you can get for FileStores
- Disable all server processes you don’t need at the beginning of downtime and before you run reposcan
- Don’t forget to pause recurring schedules before upgrade
Lessons Learned from other customers

Lessons Learned:
• Iterate on small cycles - decoupling the technical upgrade from the new features was a good choice
• Installation and configuration changes / enhancements compared to BOE XI 3.x
• Need to have better patching strategy
• Working around product issues and be proactively aware of the product changes
• Weekly project meeting with SAP was helpful

Lessons Learned:
• Skills issue – learn and get trained
• Beware of the product changes and known limitations ahead
• Proper planning is important (with all key factors taken into consideration)
• Proper sizing is very important
• Updating skills / training the BI / IT resources
• Upgrade strategy with clear workflow might sound simple but everyone in the team should be aware of
How SAP can support you
Key Links

- sap.com/upgradebi
- sap.com/learnbi
- sap.com/bivirtualization
- sap.com/bisizing
- service.sap.com/roadmap

- How to Select the Right BI Tool for Your Environment
- SAP’s Release Strategy for Major Releases of SAP BusinessObjects BI
Sizing Recommendation

- Supported Platforms (PAM) are available here: service.sap.com/pam

- A proper design and sizing exercise must be performed

- For sizing recommendation please visit BI 4.0 Sizing Microsite: http://scn.sap.com/docs/DOC-33183

- Look for SAP BusinessObjects BI 4.0 Sizing Estimator (available to customers)

- Minimum specs are available in “install guide.pdf”
Example topics Day 1

- What's new in 4.1?
- Choosing the right Client Tools
- New licensing options with BI Suite
- Customer presentation. Q&A / Wrap-up Day 1

Example Topics Day 2

- Deployment Process: Architecture, Virtualization, Sizing, Installation & Configuration, Deployment
- Upgrade Process
- Conversion Process
- Operational Management: Promotion Management, Patching, Monitoring
Overview – BI Upgrade and Migration Services
Professional Services Offering and Methodology

ASSESSMENT  (pre-delivery)
Designed to provide a technical roadmap of how to transition to SAP BI in your environment (security, reports, infrastructure, etc.)

PILOT OR INITIAL PROJECT
Provides a first project to initially deploy the software in one area of the business to develop the design, establish standards, and validate the solution.

PHASED IMPLEMENTATION
discreet groups or sub-projects to quickly deploy the remaining content or business areas onto the new platform

Successful upgrades don’t just happen…they must be planned and executed properly. The global sap consulting organization can assist.
SAP Analytics
BI Upgrade and Migration Service Portfolio

**BI Upgrade Services**

**Stage 1 - BI Upgrade Assessment Services (50109124)**
- Assess As-is BI Landscape
- Review the number of visualization objects
- Assess the effort needed for the migration and migration approach

**Stage 2 - BI Upgrade Services (50109097)**
- Factory approach for migration from older BI version to up-to-date BI version
- Optimum onsite/offshore resource mix

**BI Advisory Services**

- Alignment/Re-alignment of BI strategies with Business Objectives
- Solution Transformation and Implementation Roadmap (eg where are we now and where should we be in future etc)
- Solution Review and Advisory: Blueprint and/or Design Advisory, BI Tool Review and/or Architecture Advisory etc

**BI Migration Services**

- Replace legacy BI tools with industry leading Business Objects suite
- Seamless migration to SAP Analytics tools without disruption to day to day business

**BI Competency Centre**

- Provides a holistic view of Business Intelligence
- People, Process, and Technology
- A complete, sustainable “infrastructure” supporting the needs of the Business
Key points to take home

Plan the upgrade
• Upgrading is a demanding project. Need plan, milestones, backup and test strategies…
• Do a migration assessment and have a proper plan ready

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
Key points to take home

No reason to wait.
Play in the first league.

Start your upgrade now!
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