

# THE ULTIMATE

SAP BUSINESSOBJECTS

# UPGRADE CHECKLIST



# THE ULTIMATE

# SAP BUSINESSOBJECTS

# UPGRADE CHECKLIST

---

SAP has announced the upcoming release of BI4.3, prompting many SAP BusinessObjects customers to consider an upgrade/migration in order to take advantage of new and improved features and better serve users. (Customers currently using BI4.x will be able to upgrade; those using older versions must migrate.) What's more, is that improving the efficiency of existing BI solutions is the number 1 priority for BI leaders as shown in [our study on the BI trends of 2020](#).

Planning increases the odds of success and enhances the value proposition. According to SAP, BI4.3 will be generally available in the second quarter of 2020, which gives SAP BusinessObjects customers enough time to

lay the groundwork and plan for an upgrade/migration to the new release.

This comprehensive checklist provides a framework for the upgrade process. It was created by GB&SMITH — an SAP technology partner and the developer of 360Suite software — based on more than a decade of experience helping organizations execute upgrade and migration projects, from on-premise upgrades to cloud migrations and everything in between (hybrid architecture).

**IMPORTANT:**

Every upgrade/migration is unique, so organizations may need to add, delete, or reorder steps to customize this checklist for particular applications.



# ASSESS

Upgrading/migrating is the software equivalent of moving into a new space. As with any move, the first task is to take inventory. The following steps will help you gather information and assess the size and scope of the job.

## ASSESS USERS

Determine the total number of SAP BusinessObjects users.

Identify users who require local installation of SAP BusinessObjects client tools (e.g., Universe Designer, IDT)

Determine if servers are configured for third-party authentication (aliases) (e.g., LDAP, AD, SAP).

Identify dormant users based on last login time.

Identify empty groups.

Understand and document user security.

Understand session peaks: What time of day do they occur? How often do they occur? What are the peak values?

## ASSESS DOCUMENTS

Determine the total number of documents by type.

Determine the size of documents contained in public folders, personal folders, and inboxes.

Identify which documents are used and which are not used.

Identify duplicate documents.

Locate unpurged WebI documents.

Locate hyperlinks (OpenDocument) contained within documents.

Identify “heavy” reports (i.e., those with a large number of queries and/or rows) that could impact performance.

Identify “unbound” documents (i.e., those with weak/broken links to data sources).

## ASSESS INSTANCES

- Identify recurring instances, and understand destination locations and credentials.
- Document the filename and path of File Events.
- Determine the size of instances contained in public folders, personal folders, and inboxes.

## ASSESS UNIVERSES

- Determine the total number of Universes by type (UNV/UNX).
- Identify Universes that are not used by any documents.
- Identify Universe objects that are not used in any documents.
- Identify linked Universes.
- Understand Universe overloads (aka restrictions).

## ASSESS UNIVERSE CONNECTIONS

- Understand all Universe connections by type (e.g., relational, OLAP, BW, HANA).
- Understand connection details (e.g., database vendor, version, credentials).
- Identify connections that are not used by any Universes.
- Identify server customizations (e.g., changes to .PRM/SBO files).

## ASSESS SERVER(S)

- Document the existing landscape (e.g., environments, servers, firewalls).
- Determine the current SAP BusinessObjects version and patch level (e.g., BI4.2 SP06 Patch 3).
- Identify server size(s) (e.g., CPU, RAM, disk space).
- Identify the size of the File Repository Server (FRS) (i.e., FileStore).
- Identify server customizations (e.g., changes to session timeout and firewall port default settings).

## ASSESS LICENSES

- Determine the number of licenses by edition (e.g., Edge, Enterprise) and type (e.g., CSBL, Named, CPU).
-



# PLAN & PREPARE

In the words of Benjamin Franklin, “If you fail to plan, you are planning to fail!” Planning is the difference between an efficient upgrade/migration and one that wastes time and resources. The following steps will help you build a project plan that details the required steps, establishes a timeline, assigns roles and responsibilities, and factors in task dependencies.

## **DETERMINE SIZING REQUIREMENTS, DEFINE THE ARCHITECTURE & CONSIDER TIMING**

- Determine the number of environments (e.g., DEV, TEST, PROD, DR).
- Determine hardware requirements (i.e., sizing of CPU, RAM, disk space).
- Determine the number of servers per environment.
- Determine the operating system.
- Determine firewall requirements.
- Document database connectivity requirements (e.g., drivers, ODBC, credentials).
- Determine if other resources are required (e.g., load balancer, network share).
- Identify what software is installed on each server.
- Establish a timetable that includes enough lead time to order and receive plan requirements (e.g., hardware, databases, firewall changes).

## **BACK UP CONTENT**

- Document the backup and disaster recovery process.
- Back up the CMS system and audit databases.
- Back up the File Repository Server (FRS) (i.e., FileStore).
- Back up server customizations (e.g., changes to .PRM/.SBO files).

## **CLEAN UP THE ENVIRONMENT**

- Purge unpurged WebI documents.
- Clean inboxes.
- Clean personal folders.
- Delete or disable dormant users.
- Delete or archive obsolete instances.
- Delete or archive unused documents.
- Delete or archive Universes that are not used by any documents.
- Delete connections that are not used by any Universes.
- Delete empty groups.
- Delete or archive duplicate content.

## **CONSIDER CONTENT**

- Identify and tag content to be migrated.
- Determine the ideal approach — a single migration (“big bang”) or a phased migration (e.g., by department).
- Establish criteria to measure success.
- Pick a “go-live” date.

## **EMPOWER STAKEHOLDERS**

- Communicate with stakeholders about the upgrade/migration plan.
  - Train SAP BusinessObjects administrators on new features and platform changes.
  - Train Universe designers on new features.
  - Train Web Intelligence users on new features.
-



## EXECUTE & VALIDATE

Executing an upgrade or migration refers to putting the plan into motion. Validating is the process of making sure that the upgrade/migration went off without a hitch. The following steps will help you carry out your plan in a logical order and verify a satisfactory outcome.

### ACT ON THE PLAN

Install and configure software on server(s) and workstation(s).

Configure third-party authentication (aliases) (e.g., LDAP, AD, SAP).

Implement firewall requirements.

Implement database connectivity requirements (e.g., drivers, ODBC, credentials).

Perform functional testing of SAP BusinessObjects features (e.g., authentication, view/refresh, schedule).

Use the Upgrade Management Tool (UMT) (Note: Applies only to migrations from BOXI 3.x to BI 4.x).

Use the Promotion Management Wizard (Note: Applies only to upgrades from BI 4.x to BI 4.x).

## VALIDATE THE OUTCOME

- Confirm that all users and groups migrated as planned.
- Confirm that all Universes and Universe connections migrated as planned.
- Confirm that all Universe overloads (aka restrictions) migrated as planned.
- Confirm that all documents migrated as planned.
- Confirm that all instances migrated as planned.
- Confirm that all other SAP BusinessObjects objects migrated as planned (e.g., events, calendars, access levels).
- Confirm that the security model migrated as planned.
- Validate performance by comparing pre-migration and post-migration refresh times.
- Involve end-users in the validation process.

## RESOLVE ISSUES

- Perform regression testing to identify issues.
- Repair hyperlinks (OpenDocument), as needed.
- Update/repair WebI variables, as needed.
- Update/repair Universe overloads (aka restrictions), as needed.
- Update/repair recurring instances (destinations), as needed.
- Repair File Events, as needed.

## GO LIVE PROCESS

- Promote new and updated (delta) content from the source environment.
  - Remove user access to former environments.
  - Decommission old environments when appropriate.
-





## MAINTAIN

A successful upgrade or migration results in an efficient environment, but it takes work to keep it that way. The following steps will help you adopt best practices, such as automating maintenance tasks, that reduce costs and pave the way for easier upgrades/migrations in the future.

Automate the process of purging unpurged Web1 documents.

Automate the process of cleaning inboxes.

Automate the process of cleaning personal folders.

Automate the process of deleting or disabling dormant users.

Automate the process of deleting or archiving obsolete instances.

Automate the process of deleting or archiving unused documents.

Automate the process of deleting or archiving Universes that are not used by any documents.

Automate the process of deleting connections that are not used by any Universes.

Automate the process of deleting empty groups.

Automate the process of deleting or archiving duplicate content.

Automate the process of stripping documents of unused Universe objects.

Automate backups.

Develop a documented backup testing plan and routinely test backups

Automate delta promotions (system copy) to another environment (e.g., DR).





## INVEST IN SUCCESS

The latest version of SAP BusinessObjects promises to be better than ever. But customers must upgrade/migrate to take advantage of the new features. Upgrading/migrating doesn't have to be hard. A methodical approach — one that includes a thorough assessment and careful planning — increases the odds of a straightforward and successful execution. Once the upgrade/migration is complete, maintaining the new environment will ensure ongoing efficiency.

360Suite solutions integrate seamlessly with SAP BusinessObjects and enhance native resources in all phases of the upgrade/migration process by making it possible to:

- [Access metadata that offers key insight about users, documents, instances, Universes, Universe connections, servers, and licenses.](#)
- [Perform nightly, incremental \(delta\) backups.](#)
- [Automate time-consuming tasks and perform them in bulk, including regression testing, cleanup, and promotions.](#)
- [Analyze the impact of changes to documents and Universes.](#)

360Suite significantly enhances the value proposition by making it faster, easier, safer, and cheaper for SAP BusinessObjects customers to upgrade/migrate to the latest version. If this SAP BusinessObjects upgrade checklist seems daunting, don't panic. Contact us for more information about how 360Suite solutions can help your organization check all the boxes and save up to 80% (time and money) on the cost of upgrading/migrating to BI4.3.

[Optimize Your SAP BusinessObjects Upgrade](#)

[How a Fortune 500 Company Prepared For a Business Objects Upgrade](#)

[Vanderbilt University Medical Center Business Objects Upgrade and Epic Install: 9 Steps to Success](#)

REQUEST A DEMO

Author: Patrick Perrier





# THE ULTIMATE

SAP BUSINESSOBJECTS

# UPGRADE CHECKLIST



360 Suite



Visit <https://360suite.io>