

SAP BusinessObjects BI Platform  
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## **Recommendations for Conversion Using the Report Conversion Tool**

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# 1 About this Document

Are you considering converting your Desktop intelligence reports to Web Intelligence? Or, do you plan to upgrade your BI data from an XI 3.1 or XI R2 BusinessObjects Enterprise version to the Business Intelligence (BI) platform 4.x?

Whether you are planning the conversion or have already started the process, this document provides you with some tips and tricks for efficient and successful conversion.

The information in this document will help you to:

- Effectively plan the conversion by optimizing your time and resources to achieve the desired results.
- Understand the high level end-to-end work-flow of the conversion process, to ensure that you do not miss any essential steps in the process.

## 2 Conversion Planning: Checklist

This topic provides you with an essential check-list for carefully planning the conversion according to your needs. Before you begin conversion, note the requirements as listed below:

### 1. Analyze the impact of conversion on users:

Desktop intelligence is end of life. Assess the impact of stopping the usage of Desktop Intelligence. The conversion to Web Intelligence may also require reports to be reworked.

Identify the pain points for the most used and most important Desktop Intelligence reports. Check if Web Intelligence can actually address these issues.

Describe the level of involvement and role of the users involved in the project to move from Desktop Intelligence to Web Intelligence. This may include Development, BI Project Owners, Report Authors, BI Analysts, Business end-users and external resources.

### 2. Conduct a relative study of Desktop Intelligence and Web Intelligence supported features

Gather information on commonly used Desktop Intelligence features that may be impacted due to conversion (such as Free Hand SQL, Grouping and VBA). Also study the advantages that Web Intelligence feature support might provide for your specific requirements.

The following scenarios are possible for features:

- Desktop Intelligence feature is fully supported in Web Intelligence
- Desktop Intelligence feature is partially supported in Web Intelligence (with different workarounds or workflows)
- Desktop Intelligence feature is not supported (deprecated) in Web Intelligence
- There are new features supported in Web Intelligence that did not exist in Desktop Intelligence and which may provide an advantage for your specific requirements.

For a complete and detailed comparison of Desktop Intelligence and Web Intelligence, deprecated and new features in Web Intelligence, and tricks and work-arounds, follow this link <http://wiki.sdn.sap.com/wiki/display/BOBJ/Conversion+from+Desktop+Intelligence+to+Web+Intelligence>

[display/BOBJ/Conversion+from+Desktop+Intelligence+to+Web+Intelligence](http://wiki.sdn.sap.com/wiki/display/BOBJ/Conversion+from+Desktop+Intelligence+to+Web+Intelligence) 📄

### 3. Review your current BusinessObjects environment

- Review the version of your BI platform/ BOE (CMS) to identify appropriate migration path. New systems have a direct upgrade path where as older systems (such as BO5, 6, XI, XIR2, XI 3.1) may require extra steps.

### 4. Clean the report inventory in the CMS and group documents for conversion

Take this opportunity cleanup the inventory and only select reports that are necessary for conversion or upgrading:

- Classify source documents based on essential, useful or redundant. Identify the unused reports in the source CMS and archive them.
- Group Desktop Intelligence (.rep) reports into chunks before conversion. For example, department-based report conversion (such as Finance, Sales, IT and Marketing)

### 5. Consider the size of the source document batch before conversion

- We recommend that you convert documents in batches of less than one hundred (100). Is necessary, purge the data of large documents before converting.

### 6. Assess the level of post-conversion rework needed

- Use the Report Conversion Tool to review the conversion result (use the audit log files in the case of partially converted reports and the delta viewer [Report Comparison Tool] for fully converted reports) and assess the amount of rework required. Categorize the assessment as "no rework", "lot of rework", "some rework" and "need to recreate the reports".

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If you carry out this assessment for a group of reports, it gives you a good picture of how feasible it is to convert all your projects to Web Intelligence.

## 7. Identify user training needs

- Discuss the training requirements with users and all stake-holders to provide a working knowledge of the Web Intelligence environment post conversion of reports, .
- Use SDN forums, classroom training sessions and e-learning courses as useful resources.

Once you have gathered information for your requirements, consider which of the following statements best describes your situation or status:

- I would not move any content to Web Intelligence due to process or resource issues.
- I would not move any content to Web Intelligence due to missing features.
- I am in the process of moving some or most of my projects to Web Intelligence, although many Desktop Intelligence reports remain.
- I am in the process of moving all projects to Web Intelligence and abandoning Desktop Intelligence.
- I have completed the move to Web Intelligence and no Desktop Intelligence reports remain.

## Related Information

[Paths of Migration](#) [page 5]

[Reporting Features: Cross Versions View](#) [page 8]

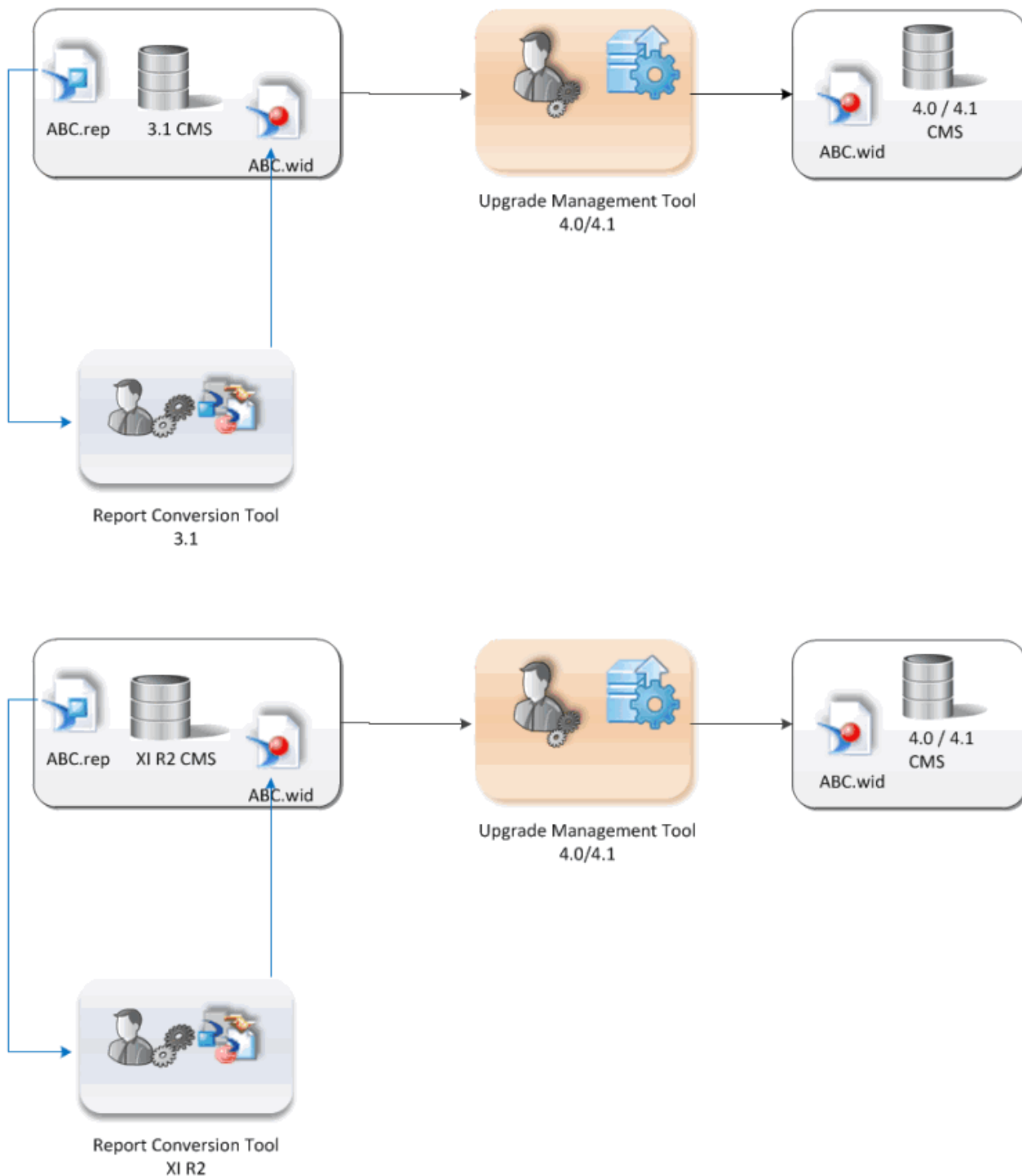
[Using Report Conversion Tool in Standalone mode: What you must know](#) [page 8]

## 2.1 Workflows for Conversion from Desktop Intelligence to Web Intelligence

This chapter explains the paths you can adopt to convert your Desktop Intelligence reports to Web Intelligence, based on the version of your source and target CMS systems:

**First Path** (indicated in the first two figures below)

1. You convert the Desktop Intelligence (.rep) reports from the XI 3.x or XI R2 CMS systems to Web Intelligence (.wid) on the same stack using the XI 3.x or XI R2 Report Conversion Tool.
2. Next, you use the Upgrade Management tool to upgrade the Web Intelligence reports and publish them to a BI 4.0 or BI 4.1 CMS.



## Second Path (indicated in the figure below)

You convert the Desktop Intelligence (.rep) reports from the XI 3.x or XI R2 CMS systems to Web Intelligence (.wid) using the Report Conversion Tool (4.0 or 4.1), and publish them to a BI 4.0 or BI 4.1 CMS system (target) without moving the dependencies of source report to the target. In this path, you do not use the Upgrade Management Tool.



### **i** Note

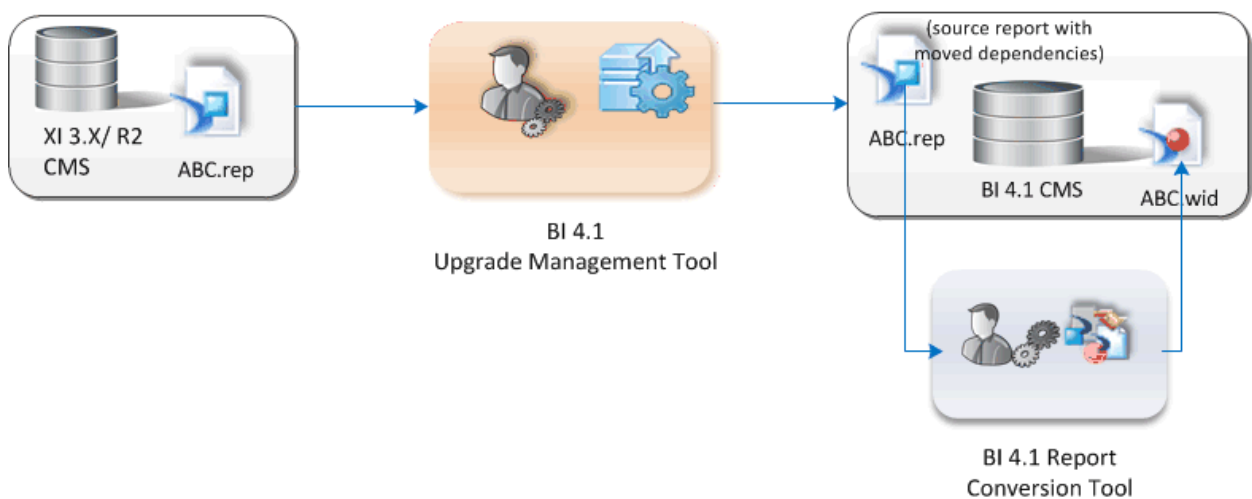
When the personal documents of administrator are converted from an XI R2 source, it is recommended to migrate the user and personal folders using the Upgrade Management Tool prior to conversion.



**Note:** In this conversion scenario, the converted report (ABC.wid) cannot be refreshed because the dependencies are not migrated to target CMS using the Upgrade Management Tool.

**Third Path** (indicated in the figure below)

1. You first migrate the XI 3.x or XI R2 Desktop Intelligence reports with their dependencies (such as folders, objects, Universes and Connections ) to the BI 4.1 CMS using the 4.1 Upgrade Management Tool.
2. Next, you use the 4.1 Report Conversion Tool to convert the Desktop Intelligence reports (.rep) to Web Intelligence (.wid) and publish them to the 4.1 CMS.



**Note:** Source Desktop Intelligence reports can reside on a BI 4.1 CMS system. In the above conversion approach, you can have both Desktop Intelligence (source) and Web Intelligence (converted) reports on the same target CMS, and can take advantage of using Desktop Intelligence features that are not yet available in Web Intelligence.

### **i** Note

All information that applies to the BI 4.1 CMS and the BI 4.1 tools in the above figures applies likewise to BI 4.1.

## 2.2 Reporting Features: Cross Versions View

The below table displays some of the common Desktop Intelligence features supported across the various release versions of Web Intelligence.

Desktop Intelligence Feature	Web Intelligence Release				
	XIR2	XI 3.0	XI 3.1	XI 3.1 SP2	BI 4.0
Edit SQL	✓	✓	✓	✓	✓
Offline Capability		✓	✓	✓	✓
Personal Data Providers		✓	✓	✓	✓
MultiCube (ForceMerge) Function		✓	✓	✓	✓
Document Autosave and Recovery			✓	✓	✓
Support Large Datasets			✓	✓	✓
Query on Query				✓	✓
Fold / Unfold				✓	✓
Input Controls				✓	✓
Fit to page					✓
Show/Hide					✓

## 2.3 Prerequisites for Using the Report Conversion Tool

You use the Report Conversion Tool in either the *Connected* or the *Standalone* mode.

In connected mode, the tool is connected to the source and destination CMS machines. In standalone mode, the Report Conversion Tool is not connected to a CMS and no security measures are enforced. You cannot import documents to or export documents from a CMS. You work with local, unsecured documents and universes only. "Local" means saved to the computer's hard disk. This does not include network servers.

If you are converting Desktop Intelligence reports to WebI in standalone mode of the Report Conversion tool, make sure that you have unsecured the .rep (Desktop Intelligence) reports as well and the associated Universes. If you do not do this, the reports will not be converted successfully.

1. Choose any one of the "Local" Desktop Intelligence documents (.rep) that you are trying to convert with the Report Conversion Tool in the standalone authentication mode. If you try to refresh the same document in the Desktop Intelligence Client in "Standalone" authentication mode, the document is not refreshed. To resolve this problem, follow these steps:

Import the associated Universe to the document using Designer.



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For the document, select "Save as" and check the option **Save for all Users**. You might not be allowed to save, as the connection used by the universe is a "Secured" connection. If this is the case, create the same connection in "Shared" Mode.

Associate this created Shared connection with the imported Universe and save the Universe with the **Save for all Users** option selected. This means, the Universe is unsecured.

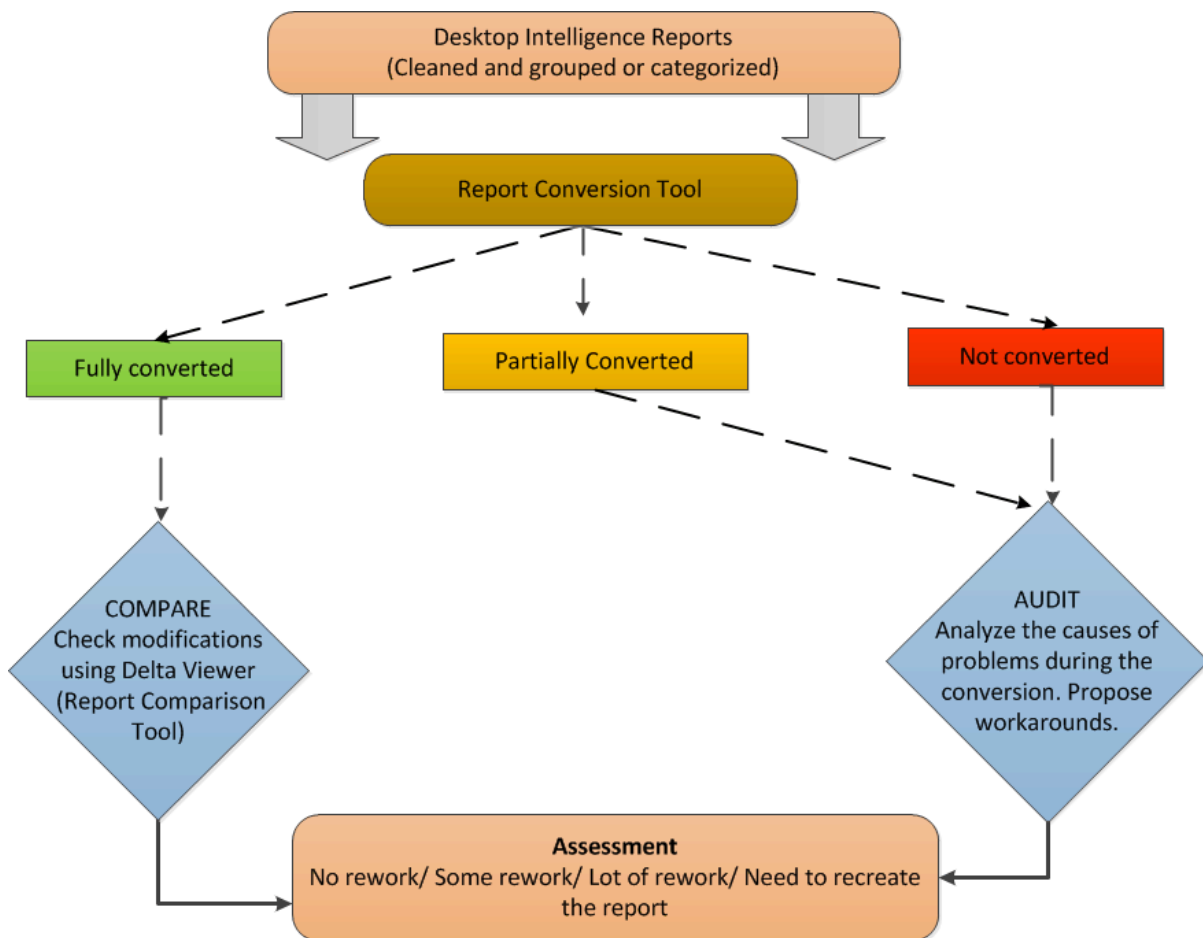
Make the document unsecured by saving it with the **Save for all Users** option.

2. Try refreshing the document in the Desktop Intelligence client. The refresh should now work.
3. Convert the local document in the Report Conversion Tool.

### 3 Conversion Steps

The steps of the entire conversion process from Desktop Intelligence to Web Intelligence are broadly defined below:

1. Get the list of documents from the various business departments and their priorities.
2. Run the conversion using the Report Conversion Tool.
3. Review the conversion result and logs.
4. Estimate the level of rework for each document.



5. Handle the rework based on the assessment. Perform the required manual checks on fully converted reports and check if they are being refreshed as expected.
6. Involve the business owners in the validation process. The fully converted documents are migrated to a quality platform for user acceptance testing. If validation fails, the documents are sent back to the conversion team.
7. Finish the document lists for each business department and deliver the packages to the SAP BusinessObjects migration team.

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## 4 Tips and Recommendations

1. Audit your Desktop Intelligence reports in the repository.
  - Separate the reports based on their usage and users
  - Not all the Desktop Intelligence reports need to be converted
2. In scenarios, where there are a large number of personalized Desktop Intelligence documents residing on the end-users system, educate them, on how to convert their documents.
3. You can convert Instances of the Desktop Intelligence reports to Web Intelligence.
  - Evaluate on how many instances needs to be converted, as it increases conversion time, and there are chances of failure due to change in original report overtime.
4. It is recommended to audit your report conversion process.
5. Evaluate the following, as the possible replacement for the Desktop Intelligence Reports:
  - SAP Lumira
  - SAP BusinessObjects Dashboards (Xcelsius)
  - SAP BusinessObjects Explorer

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## 5 Useful Links

- If you are not sure of the valid reasons for migrating from Desktop Intelligence to Web Intelligence, read: <http://www.sdn.sap.com/irj/boc/index?rid=/library/uuid/b0caa27d-13f2-2c10-02aa-fa464185ca66>
- If you want to understand the scope of features in Web Intelligence and the extended feature support, visit: <http://wiki.sdn.sap.com/wiki/display/BOBJ/Deski+and+Webi+-+scope+of+features>
- To understand how a company can move from Desktop Intelligence to Web Intelligence, read the following information: <http://www.sdn.sap.com/irj/boc/index?rid=/library/uuid/40eb2b57-8f0d-2d10-69b5-b1a52ba4b5e3>
- For information on Planning the Desktop Intelligence Conversion to Web Intelligence, read: <http://scn.sap.com/docs/DOC-41571>
- For Frequently Asked Questions on Desktop Intelligence Compatibility Pack (DCP), read: <http://scn.sap.com/docs/DOC-43592>
- For More Information on SAP BI Upgrade , read: <http://www.sapbusinessobjectsbi.com/>





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