Upgrade BOE from XI R2 to XI 3.1 (Case Study)

February 10, 2011

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Introduction

- Changing from XIR2 to XI 3.1 is an *Upgrade*
  - Same architecture
  - Same repository structure
  - Same tools
  - Upgrade install available
  - Reasonable training needs

Introduction

- However… we treat it as a *Migration*
  - Existing System in Production
  - "In-Place" upgrade is risky
    - Lengthy process
    - Software + Repository
    - Full restore required in case of problems
  - Cleanup opportunity
  - Need fallback option

What's New?

- Architecture
  - SIA vs. Services
  - Federation
  - Client Auditing
- Security Model
  - Custom Access Levels
  - Multiple Inheritance
  - Content-Specific
  - Objects vs. Container

What's New?

- Multilingual
  - Translation Manager
  - Language Packs
- Reporting & Universes
  - WebI Rich Client
  - Optional Prompts
  - Data Tracking
  - Nested Derived Tables
  - …

What's New?

- Reporting & Universes (continued)
  - SP Universes
  - OLAP Universes
  - JavaBeans Data Access Drivers
  - Open Data Access Drivers
  - Mandatory Filters
- And Much MORE!

Training – Knowledge Transfer

- Administrators
  - New Architecture
  - Security Model
  - Formal training or KT during upgrade
- Universe Designers – Super Users
  - Formal Training or “Update Training”
- End Users
  - Tailored Training

Hardware Considerations

- Overall Better Performance …
- … but requires more memory
- Recommended min. 2 GB per CPU
- Still 32-bit application
- 64-bit OS gives marginal improvement.

Common constraints

- Production system is critical to business
- Limited downtime
- Smooth transition
- Transparent to end-users

Case 1: 6.5 and XIR2

- Two systems deployed
  - XIR2 for a small division
  - 6.5 for the rest of the company
- Goal: consolidate into single system – XI 3.1

Case 2: Many Documents

- Single XIR2 system
- DeskI only
- Embedded Application
- Accumulated instances
- 300,000 documents (>200 GB)

Case 3: Active Directory

- Multiple, independent XIR2 systems
- Each location a separate project
- DeskI and WebI
- Authentication by Active Directory

Case 4: No new Hardware

- Multiple Server XIR2 system
- Existing hardware will be used for new release

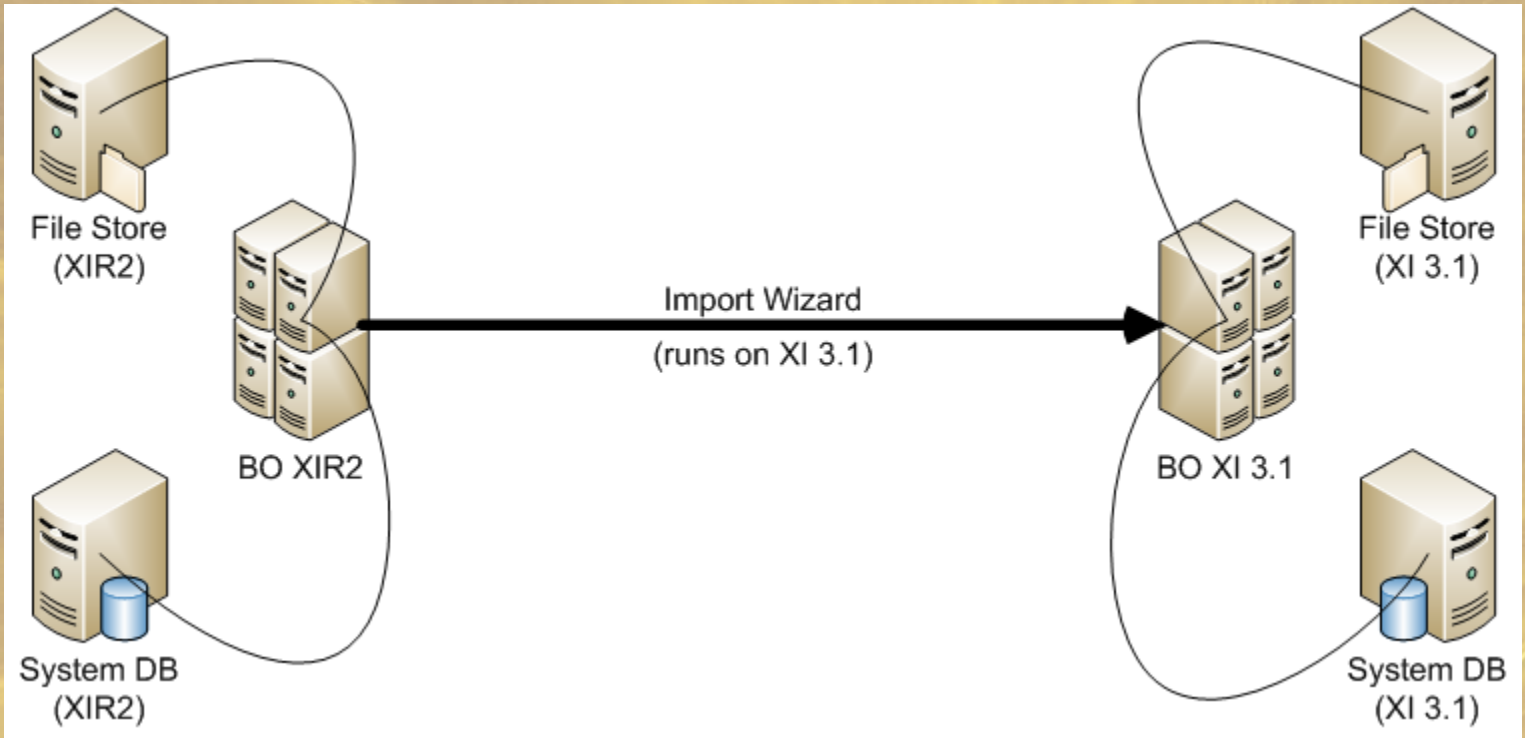
Case 5: Edge XIR2

- Single Server XIR2 Edge system
- Existing machine only one available

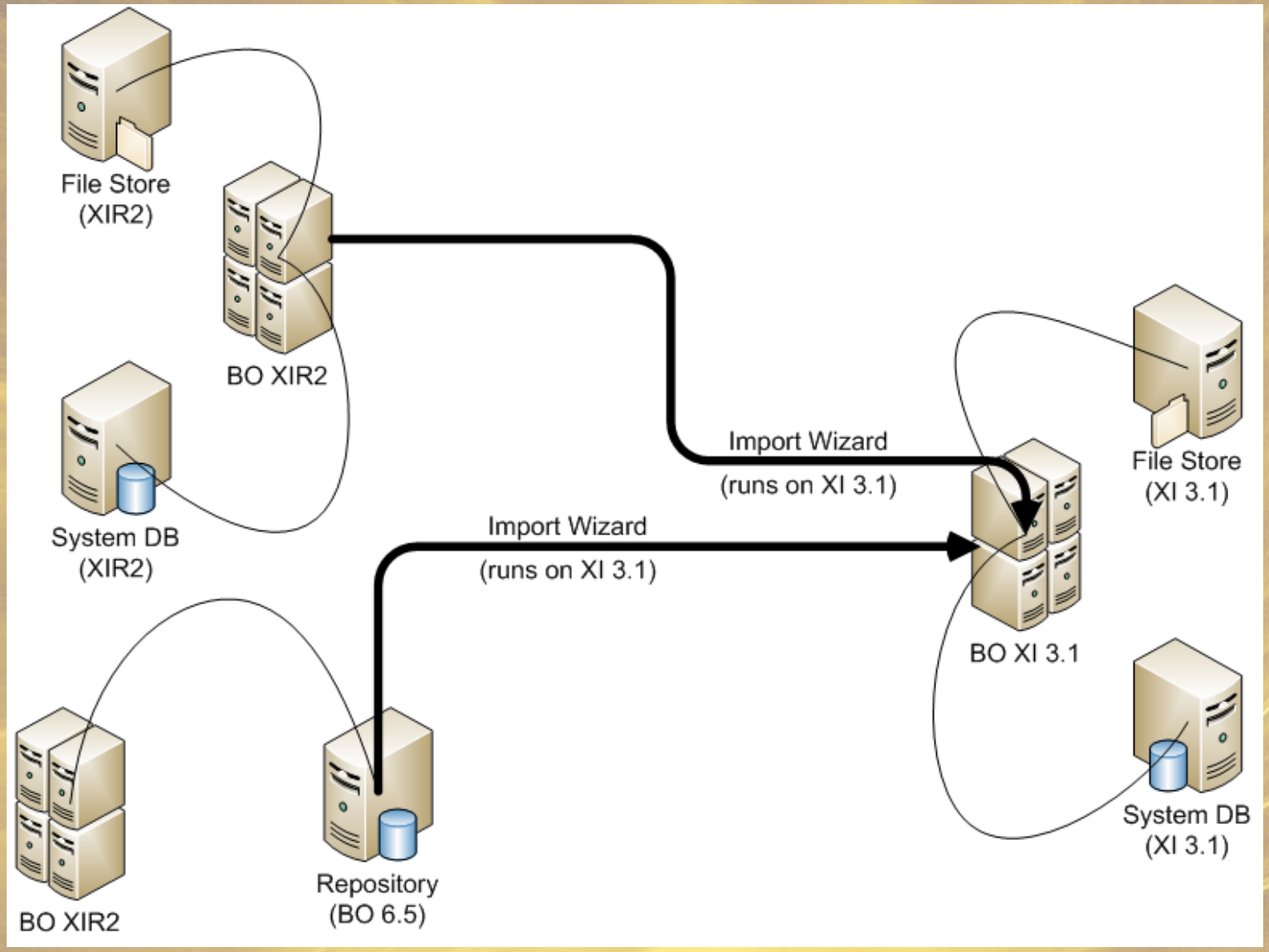
General Strategy

- Install new, blank XI 3.1 system
- Run Import Wizard
- Configure XI 3.1 system
  - Additional Servers
  - Server Groups
  - Create/Adjust security
  - Etc.
- Test new System
- Switch users to new system
- Take “old” system offline

General Strategy



Case 1: 6.5 and XIR2



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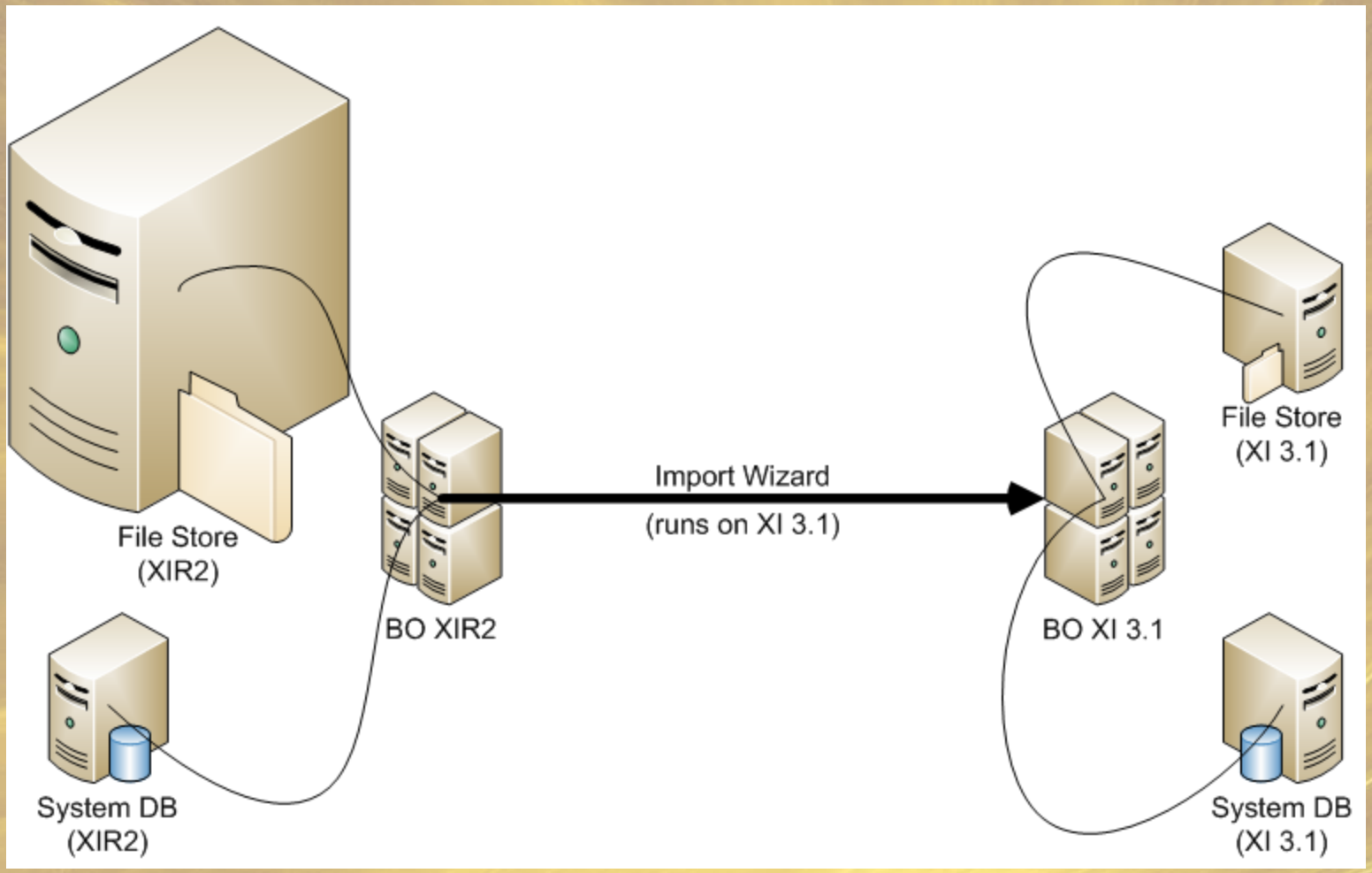
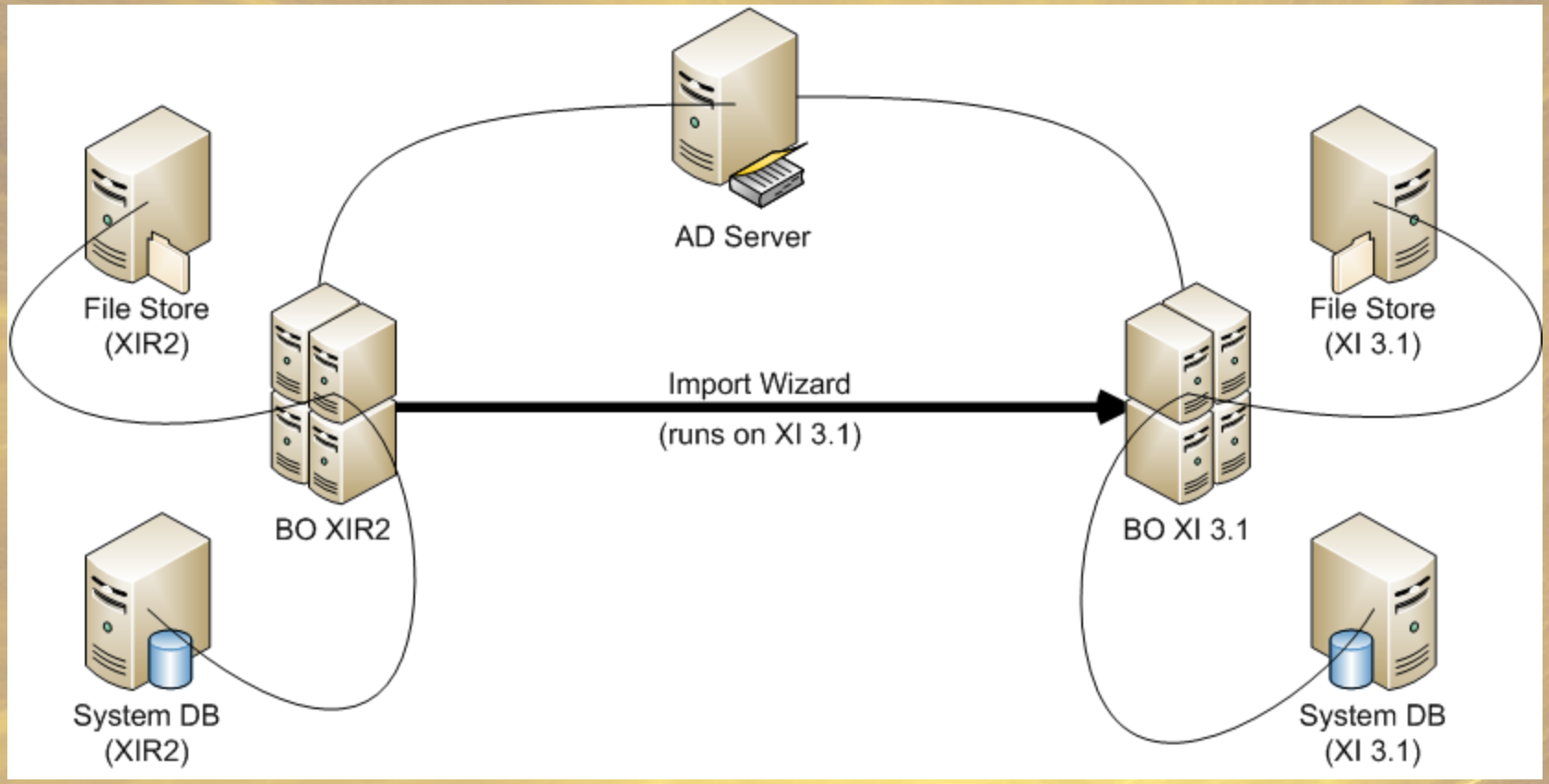
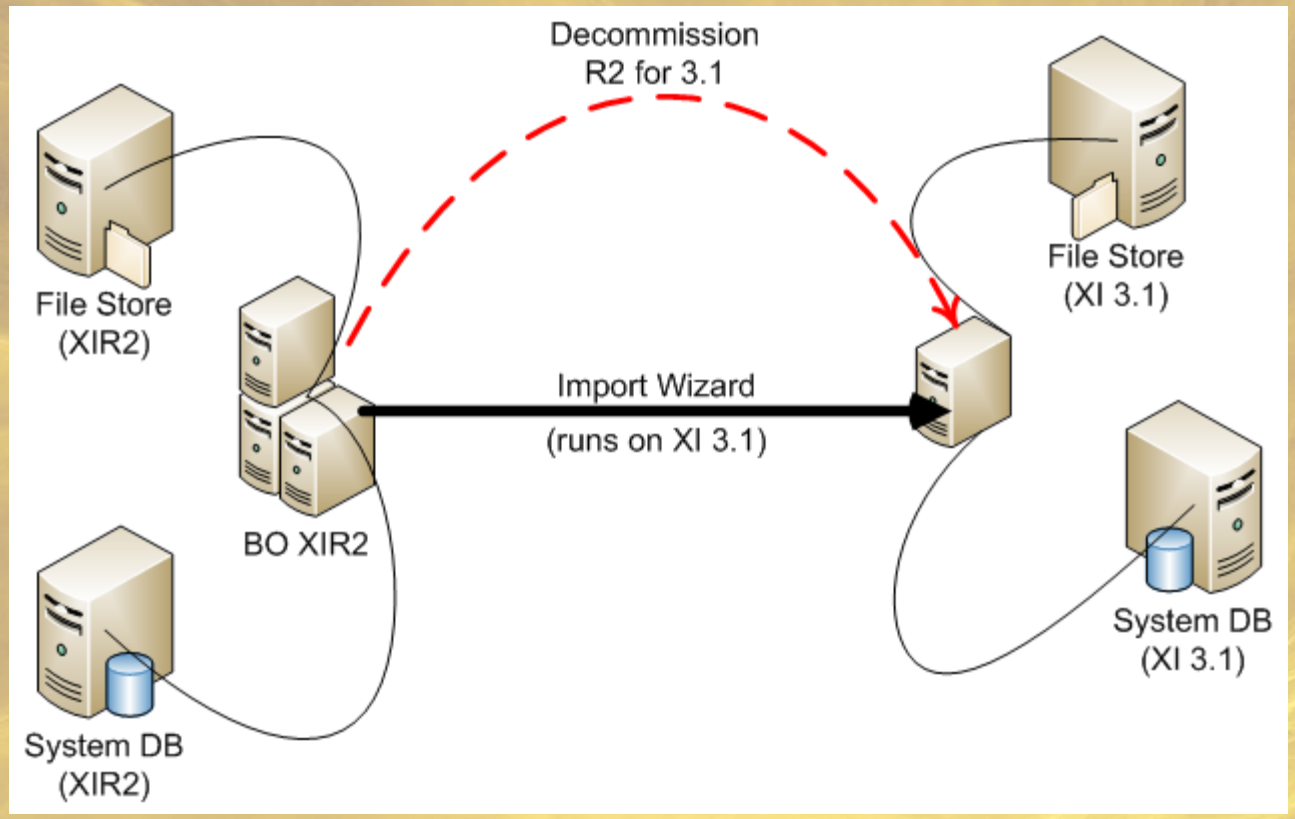


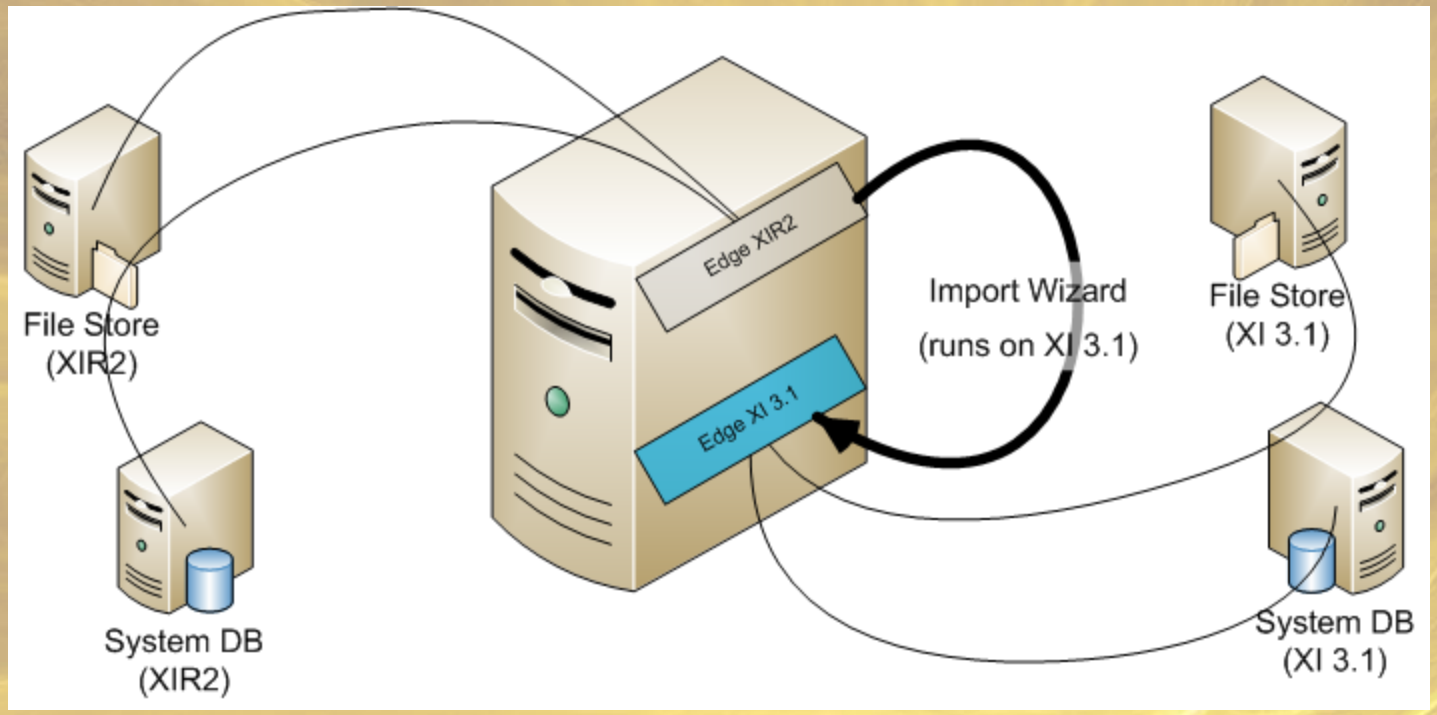
Case 3: Active Directory



Case 4: No new Hardware



Case 5: Edge XIR2



Conclusion

- There is a solution adapted to your situation
- A lot of new features require proper education
  - IT professionals
  - Users
- Comprehensive training needed or …
- … use experienced experts to guide you

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Questions?