

# BI Office BETA Converter Guide

## 1) PREREQUISITES

- a) BI Office needs to be at least **version 6.0** or higher.
- b) Pyramid 2018 needs to be version **2018.04.450** or higher
- c) All systems need to be on the same Active Directory and all data sources in both systems need to match up.

## 2) SETUP

- a) Follow the standard instructions for installing the Converter application.
  - i) The application should be installed on a machine that can be left idle - in the event the conversion payload is really large, and it requires time to process the selections.
- b) Before starting the conversion process, **backup the BI Office database repository**.
  - i) During testing phases, we also recommend backing up the Pyramid 2018 repository. This will allow operators to restore and reset the Pyramid 2018 environment for more testing (beta or otherwise), without having to recreate the entire environment over and over again.
- c) Ensure that the Active Directory settings on both systems are identical and synchronized.
- d) Create any tenants in Pyramid 2018 before you begin if you are planning to use multi-tenancy. During the conversion process, you can direct which users (and associated content) will be attached to each available tenant.

## 3) PURGE & ORGANIZE

- a) The first step is to purge as much “dead” content from BI Office as possible – using the PURGE tool. This will reduce the size of the payload to process as well as reduce the amount of “shelved” content in BI Office that will now be shelved in Pyramid 2018.
- b) Another useful step is to have all users move their preferred content into easily identifiable folders, so the “good” content items are easily identifiable in the tool. Having them perform a localized or personal clean up on their own content (delete or purge) will also help to reduce the amount of shelved content converted over.
- c) The converter allows you to upload a list of users to convert over – either as a means to convert user accounts and/or as a means to select private folders from BI Office. This is the preferred mechanism for selecting a large pool of users and content more migration.
  - i) The user import tool also facilitates a staged conversion process. By using a sub-set of the users in each conversion session, you can convert parts of the repository in steps. This is also critical in a multi-tenant conversion – since each session is directed at the chosen tenant only.

## 4) USERS and ROLES

- a) If you want to bring your users online before or while content is being migrated, use the security converter tool. This will enable all your users in the new system, before old BI Office content is made available to them – allowing them to continue with their migration path (and training) irrespective of the older content conversion.
  - i) The converter requires that the Active Directory settings on both platforms are identical before it is operational.

## 5) DATASOURCES

- a) The content conversion requires that all data sources are matched between the 2 systems. You should undertake a review of all data sources in BI Office and ensure the relevant ones have been pre-loaded in Pyramid 2018.

## 6) CONTENT SELECTION

- a) Generally, the first types of content that should be migrated are in the PUBLIC domain. We recommend starting with these selections first, followed by GROUP content. Both domains tend to be well managed/curated with less “junk” and shelved content. Once these are complete, Private domain content can be migrated using the list mechanism described above in step #2.

- i) Selections are best done using parent folders, rather than individual books or sub folders. It simplifies the selection process and administration.
  - ii) Also keep in mind that each conversion cycle is directed at a specific tenant.
- b) Use the converter switches:
- i) Converting deleted items in BI Office can often make little sense. We do not recommend turning this switch on.
  - ii) If you already have Pyramid 2018 deployed to users, we recommend using the “Create BI Office Root Folders” switch to ensure that all BI Office content is stored in a single folder, rather than directly in the domains. This will help users differentiate between the old and new content.
  - iii) Content in Pyramid 2018 is presented in alphabetical order. If you have a random order of reports in BI Office books you wish to preserve we recommend using the “preserver report order” switch.

## 7) POST PROCESSING

- a) A way to evaluate the quality of the conversion is to see the number of successful conversions compared to failures. You may also want to do a side-by-side check of content between the 2 systems.
  - i) If you find errors in the processing, please submit a ticket with the error log to Pyramid support.