

HYPERION® SYSTEM™ 9 BI+™
FINANCIAL REPORTING™, INTERACTIVE REPORTING,
PRODUCTION REPORTING, WEB ANALYSIS

RELEASE 9.2

MIGRATION PLANNING GUIDELINES



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Preface

Welcome to *Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Migration Planning Guidelines*. This preface discusses the following topics:

- [“Purpose” on page v](#)
- [“Audience” on page vi](#)
- [“Document Structure” on page vi](#)
- [“Where to Find Documentation” on page vi](#)
- [“Help Menu Commands” on page vii](#)
- [“Conventions” on page viii](#)
- [“Additional Support” on page ix](#)
- [“Documentation Feedback” on page ix](#)

Purpose

This guide provides information that you need to plan a successful migration from the following products to Hyperion System 9 BI+. Hyperion supports migration from the following product versions:

- Brio Portal 7.0.5 or later
- BrioONE (Brio Portal 7.0.5 or later and OnDemand Server 6.6.4 or later)
- Brio Intelligence Server (OnDemand Server and Broadcast Server 6.6.4 or later)
- Hyperion Analyzer 6.5, 7.0.1, 7.2, or 7.2.1
- Hyperion Performance Suite 8.x
- Hyperion Reports 2.6, 2.6.1, 7.0, 7.0.1, 7.2, or 7.2.1

Audience

This guide is for administrators and business personnel who are responsible for understanding the migration process.

This guide assumes familiarity with Hyperion products, distributed computing environments and terminology, server management, Web servers and servlet engines, and the Microsoft Windows or UNIX operating system or both.

Document Structure

This document contains the following information:

Chapter 1, “Migration Overview,” includes a brief overview of the migration process and provides information about the levels of migration. It explains the six main migration scenarios. It also describes the Migration Utility used for those migrations and includes a list of components migrated automatically, migrated manually or not migrated.

Chapter 2, “Performing Migration,” discusses environment prerequisites, manual migration steps, and role and access privilege mapping. It also provides recommendations for setting up and validating a test server, running trial migrations, and migrating the final production system.

Chapter 3, “Validating Migration Results,” lists the migration results in the form of multiple check lists. It also lists the tasks that the user should perform after migration is completed, such as setting OCE attributes and reviewing access control.

Appendix A, “Sample Migration Project Plan,” provides sample project plan for an average migration scenario.

Appendix B, “Limitations” discusses the limitations that occur when you migrate to Hyperion System 9 BI+.

Index contains a list of terms and their page references.

Where to Find Documentation

All Migration Utility documentation is accessible from the following locations:

- The HTML Information Map is available from the Migration Utility Help menu for all operating systems; for products installed on Microsoft Windows systems, it is also available from the Start menu.
- Online help is available from within the Migration Utility. After you log on to the product, you can access online help by clicking the Help button or selecting Help from the menu bar.
- The Hyperion Download Center can be accessed from the Hyperion Solutions Web site.

- To access documentation from the Hyperion Download Center:
 - 1 Go to the Hyperion Solutions Web site and navigate to **Services > WorldWide Support > Download Center**.

Note: Your Login ID for the Hyperion Download Center is your e-mail address. The Login ID and Password required for the Hyperion Download Center are different from the Login ID and Password required for Hyperion Support Online through Hyperion.com. If you are not sure whether you have a Hyperion Download Center account, follow the on-screen instructions.

- 2 In the **Login ID** and **Password** text boxes, enter your e-mail address and password.
- 3 In the **Language** list box, select the appropriate language and click **Login**.
- 4 If you are a member on multiple Hyperion Solutions Download Center accounts, select the account that you want to use for the current session.
- 5 To access documentation online, from the Product List, select the appropriate product and follow the on-screen instructions.

Help Menu Commands

Table i describes the commands that are available from the Help menu in the Migration Utility.

Table i Help Menu Commands

Command	Description
Help on This Topic	Launches a help topic specific to the window or Web page.
Contents	Launches the Migration Utility help.
Information Map	Launches the Migration Utility Information Map, which provides the following assistance: <ul style="list-style-type: none"> ● Online help in PDF and HTML format ● Links to related resources to assist you in using the Migration Utility
Technical Support	Launches the Hyperion Technical Support site, where you submit defects and contact Technical Support.
Hyperion Developer's Network	Launches the Hyperion Developer Network site, where you access information about known defects and best practices. This site also provides tools and information to assist you in getting starting using Hyperion products: <ul style="list-style-type: none"> ● Sample models ● A resource library containing FAQs, tips, and technical white papers ● Demos and Webcasts demonstrating how Hyperion products are used

Table i Help Menu Commands (*Continued*)

Hyperion.com	<p>Launches Hyperion's corporate Web site, where you access a variety of information about Hyperion:</p> <ul style="list-style-type: none"> • Office locations • The Hyperion Business Intelligence and Business Performance Management product suite • Consulting and partner programs • Customer and education services and technical support
About the Migration Utility	Launches the About the Migration Utility dialog box, which contains copyright and release information, along with version details.

Conventions

The following table shows the conventions that are used in this document:

Table ii Conventions Used in This Document


Item	Meaning
	Arrows indicate the beginning of procedures consisting of sequential steps or one-step procedures.
Brackets []	In examples, brackets indicate that the enclosed elements are optional.
Bold	Bold in procedural steps highlights user interface elements on which the user must perform actions.
CAPITAL LETTERS	Capital letters denote commands and various IDs. (Example: CLEARBLOCK command)
Ctrl+O	Keystroke combinations shown with the plus sign (+) indicate that you should press the first key and hold it while you press the next key. Do not type the plus sign.
Ctrl+Q, Shift+Q	For consecutive keystroke combinations, a comma indicates that you press the combinations consecutively.
Example text	Courier font indicates that the example text is code or syntax.
<i>Courier italics</i>	Courier italic text indicates a variable field in command syntax. Substitute a value in place of the variable shown in Courier italics.
<i>ARBORPATH</i>	When you see the environment variable <i>ARBORPATH</i> in italics, substitute the value of ARBORPATH from your site.
<i>n, x</i>	Italic <i>n</i> stands for a variable number; italic <i>x</i> can stand for a variable number or a letter. These variables are sometimes found in formulas.
Ellipses (...)	Ellipsis points indicate that text has been omitted from an example.

Table ii Conventions Used in This Document (*Continued*)

Item	Meaning
Mouse orientation	This document provides examples and procedures using a right-handed mouse. If you use a left-handed mouse, adjust the procedures accordingly.
Menu options	Options in menus are shown in the following format. Substitute the appropriate option names in the placeholders, as indicated. <i>Menu name > Menu command > Extended menu command</i> For example: 1. Select File > Desktop > Accounts .

Additional Support

In addition to providing documentation and online help, Hyperion offers the following product information and support. For details on education, consulting, or support options, click the Services link at the Hyperion Solutions Web site.

Education Services

Hyperion offers instructor-led training, custom training, and e-Learning covering all Hyperion applications and technologies. Training is geared to administrators, end users, and information systems professionals.

Consulting Services

Experienced Hyperion consultants and partners implement software solutions tailored to clients' particular reporting, analysis, modeling, and planning requirements. Hyperion also offers specialized consulting packages, technical assessments, and integration solutions.

Technical Support

Hyperion provides enhanced telephone and electronic-based support to clients to resolve product issues quickly and accurately. This support is available for all Hyperion products at no additional cost to clients with current maintenance agreements.

Documentation Feedback

Hyperion strives to provide complete and accurate documentation. Your opinion on the documentation is of value, so please send your comments by going to http://www.hyperion.com/services/support_programs/doc_survey/index.cfm.

1

Migration Overview

Migration involves migrating information from the source system to Hyperion Shared Services and the Hyperion System 9 BI+ Repository.

Customers who want to take advantage of the new and upgraded features in Hyperion System 9 BI+ must migrate from their current Brio Portal, Brio Intelligence, BrioOne, Hyperion Performance Suite 8, Hyperion Analyzer, or Hyperion Reports implementation.

In This Chapter	Overview of Hyperion System 9 BI+	12
	Migrating to Hyperion System 9 BI+	12

Overview of Hyperion System 9 BI+

Hyperion System 9 BI+ is a modular business intelligence platform providing management reporting, query and analysis capabilities for a wide variety of data sources in a single coordinated environment.

A single zero-footprint thin client provides the user with access to the following content:

- Enterprise Metrics —Management metrics and analysis presented in easy-to-use, personalized, interactive dynamic dashboards.
- Financial Reporting —Scheduled or on-demand highly formatted financial and operational reporting from almost any data source including Hyperion Planning and Hyperion Financial Management.
- Interactive Reporting —Ad hoc relational query, self-service reporting and dashboards against any ODBC data source.
- Production Reporting —High volume enterprise-wide production reporting.
- Web Analysis—Interactive ad hoc analysis, presentation, and reporting of multidimensional data.

Hyperion System 9 BI+, which includes Analytic Services, is part of a comprehensive Business Performance Management (BPM) system that integrates this business intelligence platform with Hyperion financial applications and Hyperion Performance Scorecard.

Migrating to Hyperion System 9 BI+

A migration involves hosting both currently deployed components and Hyperion System 9 BI+ software in a new implementation environment. The migration to Hyperion System 9 BI+ warrants careful analysis of your current product deployment.

The migration process, which is outlined in this document, emphasizes tasks that identify new requirements and infrastructure as a part of any new Hyperion System 9 BI+ solution. Migrating to Hyperion System 9 BI+ involves collecting essential project information, identifying or producing pertinent documentation, and conducting various reviews important to a successful upgrade.

Review the following sections for information on:

- [Migration Variables](#)
- [Migration Scope](#)
- [Hyperion System 9 BI+ Migration Utility](#)
- [Migration Scenarios](#)
- [Migration End Result](#)

Migration Variables

Individual installations vary in size, configuration, security requirements, and business solutions undertaken. Correspondingly, migration to Hyperion System 9 BI+ varies from one installation to another. Some aspects of your migration may require manual procedures. The amount of manual migration required depends on your current installation, customizations, and the capabilities that you want to implement in Hyperion System 9 BI+.

Migration Scope

The migration process involves assessing the current product deployment, planning your migration, and running test migrations. It also means preparing a QA release package for the Hyperion System 9 BI+ production deployment and incorporating operational procedures to maintain a high level of service.

To migrate successfully to Hyperion System 9 BI+, your organization needs to complete the following activities:

- Document and assess your current environment.
 - List components installed. Include an architectural diagram that shows how the core components and web servers are distributed and the size of the installation.
 - Identify your user load and job processing trends by hours of the day.
 - Describe your users' roles with respect to accessing the system's reports, analyzing data, preparing documents, scheduling reports, and managing users.
 - Perform appropriate infrastructure planning to address capacity and performance-related concerns. For detailed information on capacity planning, refer to the capacity-planning white papers located at <http://www.hyperion.com/products/whitepapers>. For further assistance in hardware planning, contact your local Hyperion Consulting Services representative or local partner.
 - Identify your authentication (login) and authorization (access rights to content) security requirements so that you can incorporate these into the migration plan.
- Review the capabilities of Hyperion System 9 BI+ in conjunction with your requirements and prepare a detailed plan for migration.
- Test and validate the migration.

Hyperion recommends performing and validating migrations on a test server. This provides the smoothest possible migration of your production system with the least impact on your overall business operations.

In addition, you may decide to run the final migration on your test server rather than on the production system. This can save time and resources, and it enables your current system and the new system to run in parallel until the new Hyperion System 9 BI+ server is ready for general use.

Hyperion System 9 BI+ Migration Utility

Hyperion is committed to the success of its new and existing customers. As such, Hyperion provides a migration utility to help existing customers migrate to Hyperion System 9 BI+.

The Hyperion System 9 BI+ Migration Utility is a comprehensive software toolkit available to customers to facilitate their migrations. The Migration Utility takes a specified set of data from supported versions of existing Hyperion products and transfers that data to a working Hyperion System 9 BI+ installation. Hyperion offers the Migration Utility at no charge to existing maintenance paying customers. The Migration Utility automates the migration process to a certain extent, but larger and more complex installations or installations with heavy customizations do require manual steps to migrate successfully.

Migration Scenarios

The automation of the migration process depends on the type of product implementation and the number of customizations in your source system. There are six basic scenarios for migrating to Hyperion System 9 BI+, and customizations can change each scenario. Each scenario has a different level of manual steps. These steps are outlined in [Chapter 2, “Performing Migration.”](#) The number and type of additional manual steps depends on customizations in your source system.

This document provides information on planning and assessing the typical solution requirements. Depending on the complexity of your migration, you may want to include local or Hyperion consulting support.

Review the following sections for information on:

- [Migrating from Brio Portal](#)
- [Migrating from BrioONE](#)
- [Migrating from Brio Intelligence](#)
- [Migrating from Hyperion Analyzer](#)
- [Migrating from Hyperion Reports](#)
- [Migrating from Hyperion Performance Suite 8.x](#)
- [Migrating a Customized Environment](#)
- [Other Migration Considerations](#)

Migrating from Brio Portal

For Brio Portal customers, migrating to Hyperion System 9 BI+ is similar to an upgrade in previous Brio Portal releases except that content is copied from one physical installation to a completely different installation environment.

Because the content is migrated to a new environment, you must complete some pre-migration steps, such as installing Hyperion System 9 BI+, setting up authentication, and configuring hosts in the target environment. See [Chapter 2, “Performing Migration”](#) for environment prerequisites and pre-migration steps.

A migration from Brio Portal is the most straightforward migration and requires the fewest manual steps.

[Table 1](#) describes the Brio Portal items that are automatically migrated, the items that you must manually migrate, and the items that are not migrated to Hyperion System 9 BI+.

Table 1 Items Migrated/Not Migrated from Brio Portal

<p>Automatically Migrated</p>	<ul style="list-style-type: none"> ● Folders ● SQR jobs ● Generic jobs ● Documents ● Personal pages ● Subscriptions ● Favorite items ● Users ● Groups
<p>Manually Migrated</p>	<ul style="list-style-type: none"> ● Custom forms See “Migrating the Test Server” on page 30 for the steps involved in migrating custom forms. Note that SmartForms are migrated as is; however, you must modify them post-migration in order to use them for the target environment. ● External authentication of users and groups You do not have to recreate users and groups in the target system. See “Components Requiring Pre-migration Steps” on page 37 for an overview of the steps required to set up external authentication in Hyperion System 9 BI+ and to migrate user and group attributes from the source system to the target system.
<p>Not Migrated</p>	<ul style="list-style-type: none"> ● Custom forms ● Knowledge Server files Not supported in Hyperion System 9 BI+. ● Personal channels Not supported in Hyperion System 9 BI+. ● External authentication systems You must set up any external authentication systems in the target environment prior to migration. ● WebClient templates The Hyperion System 9 BI+ environment uses a combination of JSP and templates. The Migration Utility does not migrate WebClient templates and their customizations.

Migrating from Brio Intelligence

You can use the Migration Utility for OnDemand Server (ODS) and Broadcast Server (BCS) migrations. Both components have their own repository database and associated documents. ODS can run as a stand-alone component or as a Portal service. When run as a Portal service, the users, groups, and folders are part of the Portal Repository.

[Table 2](#) describes the Brio Intelligence items that are automatically migrated, the items that you must manually migrate, and the items that are not migrated to Hyperion System 9 BI+.

Table 2 Items Migrated/Not Migrated from Brio Intelligence

	From ODS	From BCS
Automatically Migrated	<ul style="list-style-type: none"> Adaptive States Custom SQL variable limits Documents Folders OCEs Passthrough for Query Map Section OCE mapping User/Group attributes Users/Groups Username and password inside OCEs 	<ul style="list-style-type: none"> Calendars Directories and printers Documents External events Job cycles Job intervals Job parameters Jobs Location of output files OCEs Section OCE mapping User/Group attributes Users/Groups
Manually Migrated	<ul style="list-style-type: none"> Content requiring special information such as password-protected documents and BQY documents with detail section reports. <p>See "Migrating the Test Server" on page 30 for a description of the steps involved in manually moving Brio Intelligence components to Hyperion System 9 BI+.</p>	
Not Migrated	<ul style="list-style-type: none"> Inactive users In Hyperion System 9 BI+, inactivating a user is essentially deleting a user. Multiple ODS/BCS installations The Migration Utility does not support multiple installations of ODS/BCS as part of a networked environment where users on one host are accessing content located in a directory on another server installation. You must migrate additional installations of ODS and BCS separately. Automatic distributed refresh (ADR) Hyperion System 9 BI+ does not support automatic distributed refresh for BQY jobs. HTML template customizations 	

Migrating from BrioONE

For a BrioONE implementation that has Brio Intelligence with ODS, BCS, or ODS running as a Portal service, you must run the Portal migration first, and then run the Brio Intelligence migration.

For a BrioONE implementation, the migration is similar to a conversion where content from product A is transformed and merged with content in product B. Migrating from BrioONE is essentially the same as migrating from Brio Intelligence and Portal.

Migrating from BrioONE requires more manual steps than a stand-alone migration because you need to decide what to migrate or not migrate and how to handle duplicate content; determine the target folders in the Repository; verify data sources; convert BCS/ODS documents, jobs, and job output to Hyperion System 9 BI+ jobs and job output; and so forth. These manual steps are described in [“Migrating the Test Server” on page 30](#).

Migrating from Hyperion Analyzer

Hyperion Analyzer has a repository that contains the users, groups, folders, reports, books and batches. [Table 3](#) describes the Hyperion Analyzer items that are automatically migrated, the items that you must manually migrate, and the items that are not migrated to Hyperion System 9 BI+.

Table 3 Items Migrated/Not Migrated from Hyperion Analyzer

Automatically Migrated	<ul style="list-style-type: none">● Folders● Reports● User Preferences● Database Connections● Presentations● Folder Shortcut UI● File Permissions● Users● Groups
Manually Migrated	<ul style="list-style-type: none">● External authentication of users and groups You do not have to re-create users and groups in the target system. See “Components Requiring Pre-migration Steps” on page 37 for an overview of the steps required to set up external authentication in Hyperion System 9 BI+ and to migrate user and group attributes from the source system to the target system.
Not Migrated	<ul style="list-style-type: none">● Custom pages or Analyzer API programs Custom pages and Analyzer API programs must be rewritten to reflect the System 9.0 Web Analysis API.

Migrating from Hyperion Reports

Hyperion Reports has a repository that contains the users, groups, folders, reports, books and batches. [Table 4](#) describes the Hyperion Reports items that are automatically migrated, the items that you must manually migrate, and the items that are not migrated to Hyperion System 9 BI+.

Table 4 Items Migrated/Not Migrated from Hyperion Reports

Automatically Migrated	<ul style="list-style-type: none">● Folders● Reports● Books● Batches● Templates● Database Connections● SnapShot● Users● Groups
Manually Migrated	<ul style="list-style-type: none">● External authentication of users and groups <p>You do not have to re-create users and groups in the target system. See “Components Requiring Pre-migration Steps” on page 37 for an overview of the steps required to set up external authentication in Hyperion System 9 BI+ and to migrate user and group attributes from the source system to the target system.</p>
Not Migrated	<ul style="list-style-type: none">● Command line programs <p>Command line programs need to be updated for changes in the System 9.0 Web Analysis API.</p> <ul style="list-style-type: none">● Batch scheduling <p>Only batches are migrated to the repository.</p>

Migrating from Hyperion Performance Suite 8.x

Table 5 describes the Hyperion Performance Suite items that are automatically migrated, the items that you must manually migrate, and the items that are not migrated to Hyperion System 9 BI+.

Table 5 Items Migrated/Not Migrated from Hyperion Performance Suite

Automatically Migrated	<ul style="list-style-type: none"> ● Folders ● SQR jobs ● Generic jobs ● Documents ● Personal pages ● Subscriptions ● Favorite items ● Users ● Groups ● BQY Documents and Jobs ● Custom SQL variable limits ● OCEs ● Passthrough for Query Map ● Section OCE mapping ● Calendars ● Directories and printers ● External events ● Job cycles ● Job parameters ● ACLs
Manually Migrated	N/A
Not Migrated	<ul style="list-style-type: none"> ● Custom forms ● External authentication systems You must set up any external authentication systems in the target environment prior to migration. ● Inactive users In Hyperion System 9 BI+, inactivating a user is essentially deleting a user. ● WebClient Customizations The Hyperion System 9 BI+ environment uses a combination of JSP and templates. The Migration Utility does not migrate WebClient templates and their customizations.

Migrating a Customized Environment

You may need to contact a local consulting partner or Hyperion Solutions for support if you want to migrate any of the following customizations:

- Bulk functionality
For example, bulk load scheduled jobs in a Job Factory, bulk load/edit/delete users and groups, and bulk import/edit report properties.
- Customized security
For example, two levels of security checking or an API that performs routine synchronization with a security database.
- Altered Brio Intelligence schemas
- Customized web templates

Other Migration Considerations

In addition to understanding the general migration process and reviewing the migration prerequisites, review the following sections to understand how certain symbols and characters are handled during migration.

- [Special Symbols in Users and Groups](#)
- [SmartCuts](#)

Special Symbols in Users and Groups

There are certain symbols in a user's first name, a user's last name, a user's login ID, and a group name that are not allowed in Hyperion System 9 BI+. If the Migration Utility encounters any of these symbols, it replaces them with an acceptable symbol. [Table 6](#) shows the symbol in the source system and the symbol it is replaced with in Hyperion System 9 BI+.

Table 6 Special Symbols

Symbol in Source System	Symbol in Hyperion System 9 BI+
,	–
=	-
+	*
<	[
>]
([
)]
;	:
\	/

Table 6 Special Symbols (*Continued*)

Symbol in Source System	Symbol in Hyperion System 9 BI+
"	`
#	~ Note: The '#' symbol is replaced with the '~' symbol only if the '#' symbol is in the first position.

Example During migration, a user name of `Smith, Alex` is **changed to** `Smith_Alex`.

Note: User login IDs and group names are trimmed for space symbols in the first and last positions.

SmartCuts

SmartCuts for object names with unsupported characters will not be displayed in the Hyperion System 9 BI+ Workspace after migration. To ensure that your SmartCuts appear in the Workspace, you should update any SmartCuts in your source system to use supported characters.

For information on supported characters for SmartCuts, see “Managing SmartCuts” in the *Hyperion System 9 BI+ Workspace Administrator’s Guide*.

Migration End Result

The final product is a working Hyperion System 9 BI+ installation that contains the migrated data (including users, groups, and content) from the existing:

- Brio Portal Repository
- Brio Intelligence Broadcast Server Repository
- Brio Intelligence OnDemand Server Repository
- Brio Intelligence OnDemand Server Repository when running as a Brio Portal service
- Hyperion Analyzer Repository
- Hyperion Reports Repository

2

Performing Migration

Performing migrations on a test server provides the smoothest possible migration of your production system with the least impact on your overall business operations. In addition, you may decide to run the final migration on the test server rather than on the production system. This can save time and resources and enables the current system and the new system to run in parallel until the new Hyperion System 9 BI+ server is ready for general use. The best practice for testing and final migration involves qualified personnel working with a dedicated test environment that can be restored to its original state.

Note: The person performing the test and final migrations must be highly familiar with your current products as well as Hyperion System 9 BI+ administration tools and processes. In addition to the documentation available with the installation, many courses are available through Hyperion Education Services. Optionally, local consulting partners or Hyperion consulting can help with performing the testing, validation, and final migration process.

In This Chapter	Migration Process Checklist	24
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	Migrating the Test Server	30
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	Manual Migration Steps.	36
	Mapping Access Privileges to Hyperion System 9 BI+	39

Migration Process Checklist

Table 7 provides a brief outline of the tasks involved in migration. The following sections provide more details about each phase.

Table 7 Migration Process Checklist

Migration Steps	Details
<input type="checkbox"/> Set up a test server on the target system	Performing migration on a test server provides the smoothest possible migration of your production system with the least impact on your overall business operations. See “Creating the Test Environment” on page 25 for a detailed description of testing.
<input type="checkbox"/> Fulfill prerequisites	See “Prerequisites for Using the Migration Utility” on page 21 in the <i>Migration Guide</i> for a detailed list.
<input type="checkbox"/> Perform manual premigration steps	Some items are not automatically migrated by the Migration Utility; instead, they require pre-migration or post-migration steps to get transferred to the new system. See “Migrating the Test Server” on page 30 for a list of manually migrated items and how to migrate them.
<input type="checkbox"/> Migrate in pre-migration test mode	Review the log files for any initial problems. Use the findings to adjust your plan as necessary.
<input type="checkbox"/> Test the migration	Take extensive notes about every aspect of the initial test migration. The findings provide a tool for making adjustments to your plan. See “Migrating the Test Server” on page 30 for more details.
<input type="checkbox"/> Perform manual post-migration steps	See “Manual Migration Steps” on page 36 for a list of manually migrated items and how to migrate them.
<input type="checkbox"/> Evaluate test results	Review the log files and the target system content according to your migration plan. Use your findings to adjust your plan if necessary.
<input type="checkbox"/> Reset the test server to the original system	Use the original system copies to restore the test server to its original state. The next round of migration testing uses this “pristine” system to validate your updated migration plan.
<input type="checkbox"/> Test the migration again	When you think your migration plan covers all contingencies, try the migration one more time. Validate the migration. If the migration is not complete, perform the necessary changes and migrate again until the test results are clean.
<input type="checkbox"/> Migrate the production server	When your plan is finished, use it to perform a rapid migration of the production server. You may want to do this during off-peak hours such as evenings or over a weekend.

Note: The testing phase generally includes what the Migration Utility can migrate automatically. Evaluate what you need to manually migrate during the source system assessment and map solution strategies for those manual tasks. See [“Manual Migration Steps” on page 36](#) for steps on transferring items you must manually migrate. See [“Mapping Access Privileges to Hyperion System 9 BI+” on page 39](#) for a list of automatic and manual steps to allow users proper access Hyperion System 9 BI+ content.

Creating the Test Environment

You can set up your test environment on either one or two computers. If you have the resources to set up two systems, follow the environment prerequisites listed in the following section. If you prefer to setup one test box for both source and target environments, ensure that the third-party hardware and software used is compliant with Hyperion System 9 BI+ requirements.

The test environment must host both a source system—with Brio Portal, Brio Intelligence, Hyperion Analyzer, or Hyperion Reports installed—and target servers with Hyperion System 9 BI+ installed. If necessary, you can perform migration testing using remote session tools.

Review the following sections for information on:

- [Environment Prerequisites](#)
- [Setting Up the Source System](#)
- [Setting Up the Target Test System](#)
- [Setting Up Hosts](#)
- [Setting up Authentication](#)

Environment Prerequisites

Review the following sections to assess your source and target system hardware and software against the prerequisites for migration.

Supported Source Environments in the Existing Installation

The Migration Utility supports migration from the following product versions:

- Brio Portal 7.0.5
- BrioONE (Brio Portal 7.0.5 or later and the OnDemand Server 6.6.4 or later)
- Brio Intelligence Server 6.6.4 (OnDemand Server 6.6.4 or later and Broadcast Server 6.6.4 or later)
- Hyperion Analyzer 6.5, 7.0.1, 7.2, 7.2.1
- Hyperion Performance Suite 8.x
- Hyperion Reports 2.6, 2.6.1, 7.0, 7.0.1, 7.2, 7.2.1

Note: The Migration Utility does not support the Macintosh operating system or any customized operating systems.

Supported Target Environments

For migration from a database or platform no longer supported in Hyperion System 9 BI+, you must switch to a supported database or platform before running the Migration Utility. See the Hyperion System 9 BI+ Support Matrix on the Customer Support site for a list of supported operating systems, databases, Web servers, servlet engines, and browsers.

Note: If you do not have a supported product release installed in your source environment, you must upgrade to a supported release prior to migration. You can then install Hyperion System 9 BI+ and migrate the installation. If necessary, please contact your local consulting partner or Hyperion for assistance.

Setting Up the Source System

To set up the source test system properly, host the current production system in a test environment. The source test server should mirror the following aspects of the existing system:

- **Server configuration**—Use the same directory structure for the test system, as the one used in the current production system.
- **Data files**—Move all documents to the test environment. Use binary copies where appropriate.

If you have a functional test source system, you can delete all the objects that will not be migrated according to your migration plan from the test environment. This task is optional.

The checklists in the following sections describe the general aspects of creating a source test system. Steps may vary for each implementation. UNIX systems may require the use of binary file transfer. For information on hardware and software requirements, see [“Environment Prerequisites” on page 25](#).

Creating a Source Test System for Brio Portal/Brio Intelligence

[Table 8](#) describes the general aspects of creating a source test system for Brio Portal/Brio Intelligence.

Table 8 Brio Portal/Brio Intelligence Source Test Server Checklist

<input type="checkbox"/>	Install/upgrade the test server operating system for assessment as required. See “Environment Prerequisites” on page 25 for operating system requirements.
<input type="checkbox"/>	Open and save all repository BQYs to Brio Enterprise or Brio Intelligence 6.2.2 or later.
<input type="checkbox"/>	Copy Brio Repository tables from the production database to the test database.
<input type="checkbox"/>	Convert any Detail sections in your BQY documents to Report sections. (Hyperion System 9 BI+ does not recognize Detail sections and will not be able to open documents that contain these sections.)
<input type="checkbox"/>	Copy Brio Server INI files and the ODS password (for Windows 6.2.x versions and all UNIX installations) or define the setting, such as printers. Brio Servers (6.5) INI settings are maintained in the Windows registry. You must export the registry entry from the production system and import it into the test server registry.

Table 8 Brio Portal/Brio Intelligence Source Test Server Checklist (*Continued*)

<input type="checkbox"/>	Install Brio Enterprise or Brio Intelligence 6.2.2 or later on the test server to connect to the test Repository. Modify Repository and server configuration files (for BrioONE and Portal) to use the test server name.
<input type="checkbox"/>	Copy converted files created prior to Brio Enterprise 6.2.2 to the test server. This could take considerable time depending on the size of the ODS and BCS document directories.
<input type="checkbox"/>	Copy OCE files to the test server. Any OCE that is setup to use database drivers not compliant with Hyperion System 9 BI+ should be opened, updated, and republished to the Brio Enterprise or Brio Intelligence 6.2.2 or later prior to migration.
<input type="checkbox"/>	Copy customized HTML files to the test server. Requirements for Brio Portal and Brio Intelligence Web interface customizations should be reanalyzed for Hyperion System 9 BI+ deployment.
<input type="checkbox"/>	Test logging into the test server with customized Web pages.
<input type="checkbox"/>	Download, copy, and install the Migration Utility. See the <i>Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Migration Guide</i> for information on using the Migration Utility.

Creating a Source Test System for Hyperion Analyzer

Table 9 describes the general aspects of creating a source test system for Hyperion Analyzer.

Table 9 Hyperion Analyzer Source Test Server Checklist

<input type="checkbox"/>	Install/upgrade the test server operating system for assessment as required. See “ Environment Prerequisites ” on page 25 for operating system requirements.
<input type="checkbox"/>	Backup the Hyperion Analyzer Repository.
<input type="checkbox"/>	Copy Hyperion Reports Repository tables from the production database to a test database.
<input type="checkbox"/>	Install the version of Hyperion Analyzer that corresponds to the Production server.
<input type="checkbox"/>	Download, copy, and install the Migration Utility. See the <i>Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, Web Analysis Migration Guide</i> for information on using the Migration Utility.

Creating a Source Test System for Hyperion Reports

Table 10 describes the general aspects of creating a source test system for Hyperion Reports.

Table 10 Hyperion Reports Source Test Server Checklist

<input type="checkbox"/>	Install/upgrade the test server operating system for assessment as required. See “ Environment Prerequisites ” on page 25 for operating system requirements.
<input type="checkbox"/>	Backup the Hyperion Reports Repository.
<input type="checkbox"/>	Copy Hyperion Reports Repository tables from the production database to a test database.
<input type="checkbox"/>	Install the version of Hyperion Reports that corresponds to the Production server.

Table 10 Hyperion Reports Source Test Server Checklist (Continued)

<input type="checkbox"/>	Configure the Hyperion Reports server for the Hyperion Reports Repository.
<input type="checkbox"/>	Connect Hyperion Reports to the Production Repository.
<input type="checkbox"/>	Download, copy, and install the Migration Utility. See the <i>Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, Web Analysis Migration Guide</i> for information on using the Migration Utility.

Setting Up the Target Test System

After you set up the source test server, you can set up the target test server. You do not need to set up your target system exactly as you have your Hyperion System 9 BI+ system implemented and distributed for production use. This is because you can perform final Hyperion System 9 BI+ configuration after migration. However, you must have the correct hardware and software as specified in [“Environment Prerequisites” on page 25](#). You can set up the Hyperion System 9 BI+ installation directory according to your site’s best practice.

While your Hyperion System 9 BI+ architecture may match current product deployment infrastructure in size and number of systems, the Hyperion System 9 BI+ solutions are configured with server names different from the current production box. It is best to perform this configuration prior to migration. Plan for the appropriate IT resources to create the proper environment with new network DSN settings for the Hyperion System 9 BI+ production instance.

The checklists in the following sections describe the general aspects of creating a target test system. Steps may vary for each implementation.

[Table 11](#) describes the general aspects of creating a target test system.

Table 11 Target Test Server Checklist

<input type="checkbox"/>	Set up all supported hardware and software according to the Hyperion System 9 BI+ requirements. See “Environment Prerequisites” on page 25 for information on hardware and software requirements for the target system.
<input type="checkbox"/>	Download, copy, and install Hyperion System 9 BI+.
<input type="checkbox"/>	For a Brio Portal migration, configure your hosts (including those that you use as data sources) so that your services are distributed exactly the same way that they are distributed in the source system. See “Setting Up Hosts” on page 29 for more information on proper host configuration.
<input type="checkbox"/>	For a Brio Portal migration, set up your authentication appropriately. See “Setting up Authentication” on page 29 for more information on authentication in the target system.
<input type="checkbox"/>	Download, copy, and install the Migration Utility.
<input type="checkbox"/>	Verify that the performance of your test environment is comparable your production environment and that the appropriate output is produced.
<input type="checkbox"/>	Make a backup of the test server files, directories, and databases after the initial setup. This way, you do not have to reinstall Hyperion System 9 BI+ after each test migration.

Setting Up Hosts

When performing a Portal or BrioOne migration, define the mapping for the Source and Target hosts. Using the Migration Utility, map the source host to the target host by entering names of the source and target hosts in the Source-Target Host Mappings screen in the Migration Utility wizard. For example, you must map each source job factory to a target host job factory.

For the BrioOne and Intelligence Server migration, you will be prompted for configuration information for the Target system, including the Target Host, Target Port, Username and Password.

For Reports Migration, you will need the Reports Administrator and the Global Administrator user ID and password.

Setting up Authentication

Setting up authentication involves configuring external authentication for Hyperion System 9 Shared Services. To set up authentication, configure Hyperion System 9 Shared Services with whatever properties are needed to access the external directory services (NTLM, Microsoft AD, or LDAP).

For detailed information on setting up external authentication for Hyperion System 9 Shared Services, see the *Hyperion System 9 Shared Services Installation Guide*.

Validating the Test Environment

Before testing, validate the functionality of the test environment. [Table 12](#) lists the general steps involved in validating the test environment. The table assumes that appropriate high-level planning and system requirements have been fulfilled. For information on environment prerequisites and other migration steps, see [“Environment Prerequisites” on page 25](#) and [“Migrating the Test Server” on page 30](#).

Table 12 Test Environment Validation Checklist

Validation Steps		Details
<input type="checkbox"/>	Validate source system setup	To validate the source system setup, run the Migration Utility in the pre-migration test mode. The Migration Utility automatically confirms that all source system settings are properly mapped and that the Repository database is accessible. You can use the log files generated by the Migration Utility for troubleshooting if necessary.
<input type="checkbox"/>	Validate target system setup	Bring up the new Hyperion System 9 BI+ system at least one time to ensure that the products are installed and configured properly. Use the sample content, which is provided with the Hyperion System 9 BI+ installation to validate that the server is functional. Note: Administrators should not log into the target system as a user that is being migrated. Instead, administrators should create a new native user (in the Hyperion Shared Services User Management Console), provision the user with any necessary roles, and log into the system as the new user.
<input type="checkbox"/>	Validate the source repository	Before validating the source repository, you may want to delete all objects that will not be migrated. Validating the source repository involves testing the source Repository content for issues such as illegal document and folder names, unsupported document types like ADR managed documents, and so on.

Migrating the Test Server

You can begin migration testing after you set up and validate the test environment and create an initial plan (see “[Validating the Test Environment](#)” on page 29). In many cases, the test migration is not much different from the final migration, so you can use the guidelines discussed in this section as a basis for the final migration.

Caution! Do not publish documents in Hyperion System 9 BI+ until you successfully migrate the source system. In addition, do not change the content of the ODS and BCS repositories during migration. Make sure that jobs are not changed, no new documents are registered, and no physical resources (printers or directories), groups, users, or OCEs are added or modified.

Order of Migration

Hyperion recommends that you run the migration in a “staged” process (one type of object at a time). When using the Migration Utility it is possible to migrate all components in one run or to migrate components incrementally; however, you must migrate all components in the order displayed in the Migration Utility. Back up your data after each successful migration instance to ensure easy restoration if you need to repeat the process.

Review the following sections for information on:

- [Brio Portal Migration Order](#)
- [Brio Intelligence Server Migration Order](#)
- [Hyperion Analyzer Migration Order](#)
- [Hyperion Reports Migration Order](#)
- [Hyperion Performance Suite Migration Order](#)

Brio Portal Migration Order

When you migrate from Brio Portal or BrioONE, follow this sequence:

1. **Brio Portal pre-migration check**—Use the Migration Utility in pre-migration test mode to identify possible migration problems.
2. **Brio Portal migration**—The Migration Utility copies the metadata for the Repository Service and Event Service and maps it into the Hyperion System 9 BI+ database schema. Whether or not you choose to migrate the following components all at once or separately, you must migrate them in the order shown:
 - **Users**—Account owners identified by a user ID and user name.
 - **Groups**—Named collections of users.
 - **User Preferences**—User-specific settings.
 - **Repository Metadata**—Descriptions of the repository data. For example, the metadata could display the name of the content, permissions, etc.

- **Events**—User subscriptions and notifications of events involving subscriptions, jobs, parameter lists for jobs, and exceptions.
- **Authorization**—Access control information for folders, documents, and resources.
- **Repository Content**—The content of the system, folders, and files. Repository contents is the largest object to migrate.

Brio Intelligence Server Migration Order

When you migrate from Brio Intelligence, follow this sequence:

1. **Brio Intelligence Server pre-migration check**—Use the Migration Utility in pre-migration test mode to identify possible migration problems.
2. **Brio Intelligence Server migration**—Whether or not you choose to migrate the following components all at once or separately, you must migrate them in the order shown:

- **ODS Objects**

Users—Account owners identified by a user ID and user name.

Groups—A named collections of users.

Folders—Items are organized into folders. Folders are similar to the directories or folders of your operating system, and are arranged in a hierarchical structure. A folder can contain subfolders, items, or both.

OCE Files—Files that encapsulate and store connection information used to connect Hyperion applications to a database. OCE files specify the database API (ODBC, SQL*Net, etc.), database software, the network address of the database server, and your database user name. Once created, a user can specify the OCE file and database password and logon. An OCE file is required for a Hyperion Intelligence document to use a database, the file extension is .oce.

BQY Documents—Files created by Hyperion Intelligence and published into the Repository as files or as jobs.

Row Level Security Data—Data containing row-level security. Row-level security gives users access to only the information they need to make informed decisions. For example, managers need payroll information on their direct reports. Managers do not need to know payroll information for other departments within the organization. When you select this object, the next page in the Migration Utility wizard prompts you to configure the target row level security repository.

- **BCS Objects**

Users—Account owners identified by a user ID and user name.

Groups—A named collection of users.

Calendars—Calendars used to schedule jobs in the Broadcast Server.

Events—Events in the Broadcast Server.

Printer Paths—Printer path definitions in the Broadcast Server.

Paths—Path definitions in the BroadCast Server.

OCE Files—Files that encapsulate and store connection information used to connect Hyperion applications to a database. OCE files specify the database API (ODBC, SQL*Net, etc.), database software, the network address of the database server, and your database user name. Once created, a user can specify the OCE file and database password and logon. An OCE file is required for a Hyperion Intelligence document to use a database, the file extension is .oce.

BQY Jobs —Jobs created by Hyperion Intelligence and published into the Repository.

Hyperion Analyzer Migration Order

When you migrate from Hyperion Analyzer, follow this sequence

1. **Hyperion Analyzer pre-migration check**—Use the Migration Utility in pre-migration test mode to identify possible migration problems. The test mode is only available for users and groups. You cannot run a pre-migration test on repository content.
2. **Hyperion Analyzer migration**—The Migration Utility copies the Repository and maps it into the Hyperion System 9 BI+ database schema. Whether or not you choose to migrate the following components all at once or separately, you must migrate them in the order shown:
 - **Users and Groups**—Users are account owners identified by a user ID and user name. Groups incorporate named collections of users.
 - **Repository Content**— The content of the system, namely: folders, files, jobs, URLs, and shortcuts and their metadata (properties). The content resides in the repository, which consists of file in the native file system and metadata for each object in a database in a Relational Database Management System (RDBMS). Repository content is the largest object to migrate.

Hyperion Reports Migration Order

When you migrate from Hyperion Reports, follow this sequence:

1. **Hyperion Reports pre-migration check**—Use the Migration Utility in pre-migration test mode to identify possible migration problems. The test mode is only available for users and groups. You cannot run a pre-migration test on repository content.
2. **Hyperion Reports migration**—The Migration Utility copies the Repository and maps it into the Hyperion System 9 BI+ database schema. Whether or not you choose to migrate the following components all at once or separately, you must migrate them in the order shown:
 - **Users**—Account owners identified by a user ID and user name.
 - **Groups**—A named collection of users.
 - **Repository Content**—The content of the system, namely: folders, files, jobs, URLs, and shortcuts, and their metadata (properties). The content resides in the Repository, which consists of files in the native file system and metadata for each object in a database in a Relational Database Management System (RDBMS). Repository content is the largest object to migrate.

Hyperion Performance Suite Migration Order

When you migrate user provisioning information from Hyperion Performance Suite, follow this sequence:

1. **Hyperion Performance Suite pre-migration check**—Use the Migration Utility in pre-migration test mode to identify possible migration problems.
2. **Hyperion Performance Suite migration**—Whether or not you choose to migrate the following components all at once or separately, you must migrate them in the order shown:
 - **Users Defined Roles**—The roles defined for the users in the Hyperion performance Suite 8.x system.
 - **Users**—Account owners identified by a user ID and user name.
 - **Groups**—Named collections of users.
 - **User Preferences**—User-specific settings (such as an email address).
 - **Repository Metadata**—Descriptions of the repository data. For example, the metadata could display the name of the content, permissions etc.
 - **Repository Files**—The content of the system, folders, and files. Repository content is the largest object to migrate.
 - **Events**—User subscriptions and notifications of events involving subscriptions, jobs, parameter lists for jobs, and exceptions.
 - **Authorization**—Access control information for folders, documents, and resources.

Migration Test Checklist

Table 13 shows the basic steps involved in testing a migration, which may vary for each product implementation.

Table 13 Migration Test Checklist

Migration Test Steps	Details
<input type="checkbox"/> Migrate in pre-migration test mode	<p>First, run the Migration Utility in pre-migration test mode. When run in pre-migration test mode, the Migration Utility performs all steps necessary to run an automated migration but does not actually move files from the source system to the target system or move data to the Repository tables.</p> <p>Next, review the log files for possible complications. Correct any issues before running the actual migration without having to reset the target environment.</p> <p>For additional information on how to run the Migration Utility in pre-migration test mode, follow the instructions in the <i>Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Migration Guide</i>.</p> <p>Note: Running the Migration Utility in pre-migration test mode does not uncover all issues. Additional errors may arise in the actual migration, so try this process on a test server before initiating it on the production environment. If the test server is to become the production Hyperion System 9 BI+ instance, then your test migration is your production system. In this case, the migration process is shorter but should have the same emphasis on incremental backups throughout the process.</p>
<input type="checkbox"/> Evaluate pre-migration test run log files	<p>Evaluate the log files to determine which aspects of the source system need modification before you perform the final pre-migration test run. Modify the source system according to the log messages.</p> <p>See “Using the Migration Log Files” on page 35 for more information.</p>
<input type="checkbox"/> Migrate the test server	<p>After you get a clean pre-migration test run, perform an actual migration on the test server. Take notes about every aspect of what you encounter during this initial test migration. Also, log the time it takes to complete the automated process.</p>
<input type="checkbox"/> Validate your test	<p>Analyze the migration log files for important messages, and check all components of the migrated system. Check that all users, groups, files, directories, and properties migrated properly. Check job schedules, OCEs, and e-mail notifications. Run some jobs. Both performance and data validation are important components of validating your test migration.</p> <p>See “Validating the Test Environment” on page 29 for more information on the validation process. Use your findings to adjust your migration plan if necessary.</p>
<input type="checkbox"/> Reset the test server	<p>Reset the target test server to the original system. Use the backup copies of the original system to restore the test server to its original state. The next round of migration testing uses this “pristine” system to validate the updated migration plan.</p>
<input type="checkbox"/> Re-test the migration	<p>When you think your migration plan covers all contingencies, try the migration one more time. Make sure that you can perform a complete and successful migration using only the migration plan. Take extensive notes again. If you cannot migrate with total success, use those notes to modify the migration plan further. Keep repeating this test, reset and retest cycle until you get a totally clean migration.</p> <p>During this final test migration, keep track of the time it takes from start to finish, so you can plan the scheduling of the production system migration accordingly. Keep track of all the resources you used as well. Resource tracking should include both computer resources and personnel. You need a complete picture of everything it takes for a smooth migration of the production system.</p>

Note: While migrating the production system, users need to be locked out of the system until migration and validation are complete.

Evaluating Test Results

After completing the test migration, ensure that all components migrated correctly by checking components in the system and using the migration log files. As a result of the analysis, your team can identify the migrated content and the content that you need to recreate for Hyperion System 9 BI+. Successful testing requires a working knowledge of Hyperion System 9 BI+.

Using the Migration Log Files

The Migration Utility produces log files, which contain error messages, whenever it is run in either pre-migration *test* mode or for the actual migration in *run* mode.

The Migration Utility produces log files for each migration. The log files produced depend on which products you selected in the Migration Utility wizard.

For each product migrated, you select the level of the error messages and the location of the log files in the Migration Utility wizard.

The Migration Utility saves each log produced with a time/date stamp inserted before the `.log` extension. This makes it easy to compare the outcomes of the migrations. For example:

```
migration_0811041139.log
```

Checking the Components Within the System

Confirm that all required components and objects correctly migrate to the Hyperion System 9 BI+ test environment. [Table 14](#) includes some post-migration validation tasks:

Table 14 Post-migration Validation Tasks

<input type="checkbox"/>	Verify users and groups in the target system with a particular emphasis on permissions and group membership.
<input type="checkbox"/>	Verify folder structure and documents in the target system with particular emphasis on document location and folder ownership.
<input type="checkbox"/>	Verify OnDemand Server content in the target system with particular emphasis on documents and processing connections.
<input type="checkbox"/>	Verify Broadcast Server content in the target system with particular emphasis on jobs and events.
<input type="checkbox"/>	Verify Job Factories and jobs in the target system with particular emphasis on SQR jobs, databases, and hosts.
<input type="checkbox"/>	Verify that all jobs run according to schedule. Schedule an infrastructure review with Hyperion Consulting Services or your local partner to address performance concerns.
<input type="checkbox"/>	Verify that all jobs produce the appropriate output.

Tip: You can use the Hyperion Intelligence inventory BQY to determine source system counts for the various items migrated.

Tip: See [Chapter 3, “Validating Migration Results”](#) for an expanded list of migration validation and general post-migration steps.

Migrating the Production Server

After you thoroughly test your migration plan in a test environment, you can perform the final migration either on the same test server or on the production server. Performing the final migration on the test server can often save time and resources and may enable the current system and the new system to run in parallel until the new Hyperion System 9 BI+ server is ready for general use.

The final migration should follow the same process as that used for testing. You can use the previous sections of this chapter as a reference for both test and final migration.

Note: During the final migration process, it is critical that you have a plan for change control or that you do not make any changes until you complete the migration and validation of the production server. Failure to implement a change control process or prevent changes will most likely lead to undesired results.

After you validate the successful migration of content using the Migration Utility, you can perform system configuration and customizations as necessary according to your migration plan.

An example of system configuration is finalizing the production server according to the Hyperion System 9 BI+ architecture, which may include deleting obsolete Brio Portal Job Factories (Hosts) and data sources, installing and configuring new Job Service hosts and associated data sources, and editing affected jobs.

Allow a grace period to verify that all jobs are running according to schedule and that components are working properly in the new system. After you set up the Hyperion System 9 BI+ server to suit the needs of your organization, users can begin working with the new system.

Manual Migration Steps

Once you meet the migration prerequisites, determine which system components need to be manually migrated. Depending on your current product solution, you may need to perform fewer manual migration steps. The Migration Utility migrates most repository content, including items such as users, groups, and their attributes, documents, folders, OCEs and so on. Because of the complexity of some items, they may require manual migration steps, which are completed either prior to or after you run the Migration Utility. Other components cannot be migrated because Hyperion System 9 BI+ does not support them.

Review the following sections for information on:

- [Components Requiring Pre-migration Steps](#)
- [Components Requiring Post-migration Steps](#)

Note: You can contact your local consulting support or Hyperion for help with migrating items that are not fully supported by the Migration Utility.

Components Requiring Pre-migration Steps

Table 15 lists the pre-migration steps for components that the Migration Utility does not automatically migrate. After you perform these pre-migration steps, you can use the Migration Utility to automate migration for the remainder of the components.

Table 15 Pre-migration Steps for Items Not Automatically Migrated by the Migration Utility

Components Manually Migrated	Pre-migration Step	Source System
BQY documents with detail section reports	Convert BQY documents with detail section reports (left over from 5.5) into report sections. Then save the documents in Brio Enterprise or Brio Intelligence 6.2.2 or later and delete the detail section.	Intelligence Server
Externally authenticated users and groups	The Migration Utility does not migrate users and groups that were imported into Portal from an external source. As a result, you should set up your Hyperion System 9 BI+ Shared Services to import users and groups from the same external source you used to import them into Portal. Perform this step prior to Portal migration."	Portal
MAPI email addresses	MAPI email addresses are not supported in Hyperion System 9 BI+. Convert MAPI email addresses to SMTP addresses prior to migration.	Intelligence Server
Multiple register-to-ODS actions in one cycle	<p>Review the appropriate Intelligence Repository Inventory BQY job query (BrioONE or Brio Intelligence Server version) for save job actions to determine if a job performs more than one save to ODS.</p> <p>Only the first of multiple register-to-ODS actions in one cycle is migrated. In Hyperion System 9 BI+, the action equivalent to the cycle Register to ODS action is the Save as job output action. Hyperion System 9 BI+ supports only one Save as job output action per cycle.</p> <p>To migrate each Register to ODS action, before migration, separate Register to ODS actions into different cycles – one cycle for each action.</p> <p>Optionally, after migration, you can add multiple cycles to a job to have multiple action operations for that job. Hyperion System 9 BI+ has single-cycle BQY jobs and multiple-cycle BQY jobs; action operations apply only to multiple-cycle BQY jobs.</p> <p>Note: When publishing jobs manually, you must check the box that allows users to create their own cycles and actions. This option is not available after a job is published.</p>	Intelligence Server
Password protected documents	Remove password protection to migrate these documents	Intelligence Server
Group and folder names with special characters	<p>There are certain symbols in a user's first name, a user's last name, a user's login ID, and a group name that are not allowed in Hyperion System 9 BI+. If the Migration Utility encounters any of these symbols, it replaces them with an acceptable symbol.</p> <p>See "Special Symbols in Users and Groups" on page 22 in the <i>Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Migration Guide</i> for information on the symbols are replaced after migration to Hyperion System 9 BI+</p>	
General source system cleanup	You may want to remove source system content that is no longer used or referenced such as: invalid or unused OCEs, expired reports, irrelevant jobs, users no longer with the company, outdated groups, etc.	N/A

Note: If you configured row-level security (RLS) parameters in your Hyperion System 9 BI+ installation prior to migration, the Migration Utility automatically migrates these parameters. After migration, make sure that RLS is enabled in the new system.

Components Requiring Post-migration Steps

Table 16 lists the post-migration steps for migrating components that the Migration Utility does not automatically migrate. See “Validating Hyperion Performance Suite Migration” on page 51 for more information.

Table 16 Post-migration Steps for Items Not Automatically Migration by the Migration Utility

Components Not Migrated	Post-migration Step	Migration Utility
Alternate metadata OCEs	Alternate metadata OCEs are not migrated. After migration, you must reestablish the link to the alternate metadata OCE.	Intelligence Server
Append Job ID and Report Cycle Name to File Name to Ensure Uniqueness job parameter.	The Append Job ID and Report Cycle Name To File Name to Ensure Uniqueness action parameter is not migrated. You must modify the Append Unique Identifier to Filename parameter in Hyperion System 9 BI+ after migration.	Intelligence Server
Locally saved documents	<p>The Migration Utility does not migrate locally saved documents, but the “source” document from which the locally saved document originated is migrated.</p> <p>After migration, if users want to work with locally saved documents online, they must manually enter the URL of the new servlet in the Connection Dialog box. The user must choose Edit on the dialog box and change the server computer name in the URL to that of the new system.</p> <p>For example, the user must replace the bracketed information in the following URL to connect:</p> <p>http://< server machine name>/Brio/dataaccess/browse?</p> <p>By editing the URL, users reestablish the link between the local and the published copy of the document. After a user saves a document with the new URL, the user is no longer prompted to enter the new URL when working with that document online.</p> <p>Note: You can allow users to publish their documents to the server by giving them appropriate rights to a personal directory.</p>	Intelligence Server
SmartForms (custom forms)	The custom forms for SQR are now created with JSP (Java Server Page) technology; previous versions were created with HTML. SmartForms must be re-created or edited with JSP to work in Hyperion System 9 BI+.	Portal
Web client customizations	Web client customizations are not migrated. They must be redone after migration.	Intelligence Server

Mapping Access Privileges to Hyperion System 9 BI+

Hyperion System 9 BI+ uses roles as a way of granting users and groups access to business functions. For example, the job publisher role grants the privilege to run or publish a job. Before migrating, make a detailed plan for applying roles and access privileges in the Hyperion System 9 BI+ system, based on the Migration Utility generic system for granting roles and access privileges.

Review the following sections for information on:

- [Role Mapping](#)
- [Access Control Mapping](#)

Role Mapping

To preserve the functions assigned to certain users and groups in the old system, the Migration Utility maps these users and groups to new roles in Hyperion System 9 BI+. In some cases the Migration Utility automatically assign roles at the group or user level, but in other cases you must assign roles as a post-migration step.

See “[Migrating Roles](#)” on page 17 in the Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, and Web Analysis Migration Guide for information on how legacy roles in the source system are mapped to new roles in Hyperion System 9 BI+.

Access Control Mapping

BQY documents and scheduled jobs in the Brio Intelligence repositories do not have access control like that in Portal and Hyperion System 9 BI+. The Migration Utility uses the guidelines in [Table 17](#) to apply access to migrated components.

Table 17 Access Control on Migrated Components

Server	Components	Access Privilege
ODS	Folders	All ODS groups get View access control on ODS folders. The Content Publisher role gets Modify access on ODS folders. BI_Migrate.ini provides a parameter value that enables you to assign all ODS groups to one default ODS group. If you have many ODS groups, having this “parent” group makes assigning access control privileges on folders much more efficient than having to assign access control privileges to many groups individually.
	OCEs	The owner of ODS OCEs is the Administrator (the user who performs the migration). The Content Publisher role is assigned View access privilege to ODS OCEs.
	Documents	After migration, there is no change in the adaptive states on ODS-registered documents. However, the corresponding access privileges are added. Consider these examples: <ul style="list-style-type: none">• If the Sales Group has View adaptive state in the source system, it has View access to documents and View adaptive state access on jobs in Hyperion System 9 BI+.• If the Marketing Group has View and Analyze adaptive state in the source system, then it has View access to the document and View and Analyze adaptive state access on jobs in Hyperion System 9 BI+.

Table 17 Access Control on Migrated Components (*Continued*)

Server	Components	Access Privilege
BCS	BCS jobs	In Hyperion System 9 BI+, job owners have full control and Datamodel adaptive state access on their jobs but have no specified control on the job output.
	Job output	Because the publishing user has to specify Group adaptive state access to the job output in the same way as with a BQY document, groups are given various levels of adaptive state access. So if Sales has View and Analyze on the output, then Sales has View access to the output properties and View and Analyze access to the content.
	Job schedules and parameters	The user who scheduled the job is the owner of the job in the new system. In Hyperion System 9 BI+, job owners have full control access and Datamodel adaptive state access on their jobs but have no specified control on the job output.
	OCEs	The owner of OCEs is the Administrator (the user who performs the migration). The Job Publisher role is assigned View access on BCS OCEs
	Physical resources	Groups that have access to directories and printers have View access to those same directories and printers in Hyperion System 9 BI+.
	Calendars and externally triggered time events	The Public group and all custom groups should have access to these calendars and externally triggered events. Administrators already have access, because the Migration Utility assigns the Schedule Manager role to users who belonged previously to the Administrator group. Therefore, administrators have implicit access to all objects in the Hyperion System 9 BI+ Repository.
HPSu	Deactivated Users/Groups	Deactivated users and groups are not migrated to Hyperion System 9 BI+. As a result, you should activate any deactivated users that you want to migrate prior to migration. Users can be manually deactivated after migration using the Hyperion System 9 Shared Services User Management Console. Hyperion System 9 Shared Services does not support the deactivation of groups.

3

Validating Migration Results

After you complete the migration, ensure that all components migrated properly. This process includes checking the components in your system and using the log files to validate migration. You may have migrated some or all of the following components:

- Brio Portal 7.0.5
- BrioONE (Brio Portal 7.0.5 or later and the OnDemand Server 6.6.4 or later)
- Brio Intelligence Server 6.6.4 (OnDemand Server 6.6.4 or later and Broadcast Server 6.6.4 or later)
- Hyperion Analyzer 6.5, 7.0.1, 7.2, 7.2.1
- Hyperion Performance Suite 8.x
- Hyperion Reports 2.6, 2.6.1, 7.0, 7.0.1, 7.2, 7.2.1

After you validate the migration, you need to perform post-migration steps to ensure proper functionality of your Hyperion System 9 BI+ system. The various components should function with the same level of effectiveness in your new environment as they do in your existing system.

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Validating Brio Portal Migration

Use [Table 18](#) as a checklist to confirm that all required Brio Portal components and objects have correctly migrated to the new Hyperion System 9 BI+ environment.

Table 18 Brio Portal Migration Checklist

Brio Portal Component	Explanation
<input type="checkbox"/> Users	All users and user attributes are migrated to the new environment. See “Mapping Access Privileges to Hyperion System 9 BI+” on page 39 for information on role mapping.
<input type="checkbox"/> Groups	All groups and group attributes are migrated to the new environment. See “Mapping Access Privileges to Hyperion System 9 BI+” on page 39 for information on role mapping.
<input type="checkbox"/> Folders	All the folders defined in the system are migrated to the new environment.
<input type="checkbox"/> Documents and links	Documents and links in the source system are migrated without any issues of access. (See “Mapping Access Privileges to Hyperion System 9 BI+” on page 39.)
<input type="checkbox"/> File system for Repository	The file system for the Repository is migrated.
<input type="checkbox"/> Generic job properties	All available scenarios are migrated. This is job dependent.
<input type="checkbox"/> Job runs in Hyperion System 9 BI+	Migrated jobs run without errors. In cases where the job uses a SmartForm, revert to the default and make sure the job runs with this default HTML form. You must recreate the SmartForm in Hyperion System 9 BI+ for it to work.
<input type="checkbox"/> MIME types	All MIME types are migrated to the new environment. MIME types associated with each job should also be migrated. Note: If you have one file extension (.txt for example) associated with multiple custom MIME types (A, B, C, and D for example) in the source system, and A is a supported MIME type in Hyperion System 9 BI+, the MIME types migrate as follows: MIME types A, B, C, and D are merged into the supported Hyperion System 9 BI+ MIME type. After migration, the custom MIME types seem to have disappeared but they have actually been merged.
<input type="checkbox"/> Object property settings and keywords	Property settings of browsable and nonbrowsable objects are migrated. Keywords for objects in the source system should be migrated.
<input type="checkbox"/> Parameter lists	Parameter lists are migrated as public with the publishing mask (Access Control) set as it is in the source system.
<input type="checkbox"/> Portal objects	These Portal Objects are migrated: <ul style="list-style-type: none"> ● Broadcast messages ● Preconfigured Portal Pages ● Image bookmarks ● HTML files or job output displayed as Portal Objects ● Exceptions dashboards ● Bookmarks
<input type="checkbox"/> Production Reporting jobs	You can run Production Reporting jobs without any problems using the default parameter form. You must recreate SmartForms in Hyperion System 9 BI+.

Table 18 Brio Portal Migration Checklist (*Continued*)

Brio Portal Component	Explanation
<input type="checkbox"/> Production Reporting job properties	<p>All properties are migrated, including:</p> <ul style="list-style-type: none"> ● General properties: Name, description, owner, expiration (if available), group ● MIME Type, Secure Mode, Rating, Exception, Browse flag, Permissions, Background vs. Foreground, Prompt for database ● Ask properties ● Input properties ● INI file ● Include files ● Output properties: Auto delete, Object time to live, Make output displayable as embedded ● Permissions on job output ● Propagate permissions ● Production Reporting program ● Include files ● Output Formats ● HTML demand paging ● Custom output flags; for example -burst ● Database username/password, command line flags, Run using (data source + Production Reporting version) ● Compile now ● Form -Files required by SmartForm (The form itself must be modified to work in the target environment). ● Advanced options ● Show parameter lists when running job <p>Show save as default</p>
<input type="checkbox"/> Subscriptions	<p>User subscriptions are migrated to the new environment.</p>
<input type="checkbox"/> Time events	<p>Time events are migrated to the new system as public or personal recurring time events.</p>

Note: After you complete the migration, you must recompile all your Production Reporting jobs. After you recompile the Production Reporting jobs, they should work in the target environment with code changes. Exceptions would include programs that use deprecated Production Reporting commands. Refer to Volume 2 in the *Production Reporting Developer's Guide* for information on deprecated commands.

Validating Access Control on Job Output Runs

The way in which access control on job output is granted varies from Brio Portal v7.x to Hyperion System 9 BI+. In Brio Portal, the group to which access is granted on job output may vary depending on which user runs the job. Because access control on a single job's output can vary depending on who ran the job in the source system, the way in which the Migration Utility applies access control on job output run in Hyperion System 9 BI+ may vary as well.

Use the `jobPublishingMasksCreated.xml` file, located in the same directory as the Migration Utility, to verify that the proper access control is given to job output run in Hyperion System 9 BI+. This XML file lists the access control information for the job output of each job migrated to the new system.

Note: The syntax of XML (Extensible Markup Language) requires that each element have an opening tag `<element tag>` and closing tag `</element tag>`. XML elements are nested to create a hierarchy of elements.

Table 19 defines the tags used in the `jobPublishingMasksCreated.xml` file. Refer to “[Sample jobPublishingMasksCreated.xml](#)” on page 46 to view the format of the `jobPublishingMasksCreated.xml` file.

Table 19 `jobPublishingMasksCreated.xml` Tag Definitions

Tag	Definition
<code><JOBMASKS></code>	Begins the document. The closing tag <code></JOBMASKS></code> appears at the end of the document.
<code><JOB></code>	Begins a specific job. The closing tag <code></JOB></code> ends each job.
<code><JOBNAME></code>	Specifies the job name.
<code><PATH></code>	Specifies the location of the job in Browse module.
<code><JOBPUBLISHINGMASK defined='true/false'></code>	<p>Specifies whether the administrator defined a publishing mask for this job in the source system. If <code>defined=TRUE</code>, the Migration Utility used the publishing mask specified in the old system. If <code>defined=FALSE</code>, the Migration Utility used the publishing mask of the user who runs the job. In the latter case, an additional list of elements is included for your information:</p> <p><code><GROUPREAD></code> <code><GROUPWRITE></code> <code><GROUPEXECUTE></code> <code><WORLDREAD></code> <code><WORLDWRITE></code> <code><WORLDEXECUTE></code></p> <p>These elements can have a value of 1 or 0, where 1 indicates that access is granted and 0 indicates that access is denied.</p> <p>Notice the difference between the two jobs in “Sample jobPublishingMasksCreated.xml” on page 46. The second job, <code>job2</code>, has a specified job publishing mask—the element is defined as <code>TRUE</code>, so these extra elements are included.</p>

Table 19 jobPublishingMasksCreated.xml Tag Definitions (Continued)

Tag	Definition
<JOBPUBLISHING-MASKACCESSORS>	<p>Begins the list of users and groups that can access the job output in Hyperion System 9 BI+. It includes the following sub-elements: <ACCESSOR> and <ROLE>, where <ACCESSOR> specifies a user or group that has access on the job output in Hyperion System 9 BI+, and <ROLE> specifies the access privilege the preceding accessor has on the job output. In the following example the user ADMINISTRATOR and world group have Modify access privilege on the job output:</p> <pre data-bbox="509 415 959 636"> <PUBLISHINGMASKACCESSORS> <ACCESSOR>ADMINISTRATOR</ACCESSOR> <ROLE>MODIFY</ROLE> <ACCESSOR>world</ACCESSOR> <ROLE>MODIFY</ROLE> </PUBLISHINGMASKACCESSORS> </pre> <p>Note the first accessor listed, which may be the accessor created from the default group. The Migration Utility chooses the default group of the job owner. However, the group the utility chooses may not match the one to which you want to assign default access in the new system, so modify the access as necessary.</p> <p>In the case of external authentication with externally managed groups, this default group may not exist.</p>
<DATEPUBLISHED>	Specifies the date the job was published.
<FOLDERGROUP>	Specifies the group associated with the permissions of the folder where the job output was published in the source system.
<FOLDERPERMISSIONS>	<p>Begins the list of user and group permissions on the folder that contains the job in the source system. It includes the following sub-elements:</p> <pre data-bbox="509 1041 683 1262"> <GROUPREAD> <GROUPWRITE> <GROUPEXECUTE> <WORLDREAD> <WORLDWRITE> <WORLDEXECUTE> </pre> <p>These elements can have a value of 1 or 0, where 1 indicates that access is granted and 0 indicates that access is denied.</p>
<JOBOWNER>	Indicates the owner of the job.

Table 19 jobPublishingMasksCreated.xml Tag Definitions (Continued)

Tag	Definition
<JOBACCESSORS>	<p>Begins the list of users and groups that can run the actual job in Hyperion System 9 BI+. It includes the following sub-elements: <ACCESSOR> and <ROLE>, where <ACCESSOR> specifies a user or group that has access on the job in the target system, and <ROLE> specifies the access privilege the preceding accessor has on the job. In the following example the user administrator and the world group have Modify and Run access privilege on the job:</p> <pre data-bbox="461 415 911 638"> <JOBACCESSORS> <ACCESSOR>ADMINISTRATOR</ACCESSOR> <ROLE>MODIFY AND RUN</ROLE> <ACCESSOR>world</ACCESSOR> <ROLE>MODIFY AND RUN</ROLE> </JOBACCESSORS> </pre>
<JOBUUID>	<p>Indicates the UUID of the job.</p> <p>"Sample jobPublishingMasksCreated.xml" on page 46 includes only two jobs: one job with a specified publishing mask and a second job without a specified publishing mask.</p>

Sample jobPublishingMasksCreated.xml

```

<JOBMASKS>

  <JOB>
  <JOBNAME>job1</JOBNAME>
  <PATH>/genericjobs/</PATH>
  <JOBPUBLISHINGMASK defined='false'>
  </JOBPUBLISHINGMASK>
    <PUBLISHINGMASKACCESSORS>

      <ACCESSOR>ADMINISTRATOR</ACCESSOR>
      <ROLE>MODIFY</GROUP>
      <ACCESSOR>world</ACCESSOR>
      <ROLE>MODIFY</GROUP>

    </PUBLISHINGMASKACCESSORS>
    <DATEPUBLISHED>2003-01-14 14:29:18.0</DATEPUBLISHED>
    <FOLDERGROUP>ADMINISTRATOR</FOLDERGROUP>

    <FOLDERPERMISSIONS>
      <GROUPREAD>1</GROUPREAD>
      <GROUPWRITE>1</GROUPWRITE>
      <GROUPEXECUTE>1</GROUPEXECUTE>
      <WORLDREAD>1</WORLDREAD>
      <WORLDWRITE>1</WORLDWRITE>
      <WORLDEXECUTE>1</WORLDEXECUTE>

    </FOLDERPERMISSIONS>
    <JOBOWNER>administrator</JOBOWNER>
  </JOBACCESSORS>

```

```

    <ACCESSOR>ADMINISTRATOR</ACCESSOR>
    <ROLE>MODIFY AND RUN</ROLE>
    <ACCESSOR>world</ACCESSOR>
    <ROLE>MODIFY AND RUN</ROLE>

</JOBACCESSORS>

<JOBUUID>F0RFYLF0ENFHCCFIECDLDRP_ZhinZr-CRRP_EHINER</JOBUUID>
</JOB>
<JOB>

<JOBNAME>job2</JOBNAME>
<PATH>/SampleContent/Human_Resources/Employees/</PATH>
<JOBUBLISHINGMASK defined='true'>

    <GROUPREAD>1</GROUPREAD>
    <GROUPWRITE>1</GROUPWRITE>
    <GROUPEXECUTE>1</GROUPEXECUTE>
    <WORLDREAD>1</WORLDREAD>
    <WORLDWRITE>1</WORLDWRITE>
    <WORLDEXECUTE>1</WORLDEXECUTE>

</JOBUBLISHINGMASK>

<PUBLISHINGMASKACCESSORS>
    <ACCESSOR>BrioPortal_Demo</ACCESSOR>
    <ROLE>MODIFY</ROLE>
    <ACCESSOR>world</ACCESSOR>
    <ROLE>MODIFY</ROLE>

</PUBLISHINGMASKACCESSORS>
<DATEPUBLISHED>2003-01-13 14:54:36.0</DATEPUBLISHED>
<FOLDERGROUP>BrioPortal_Demo</FOLDERGROUP>
<FOLDERPERMISSIONS>

    <GROUPREAD>1</GROUPREAD>
    <GROUPWRITE>1</GROUPWRITE>
    <GROUPEXECUTE>1</GROUPEXECUTE>
    <WORLDREAD>1</WORLDREAD>
    <WORLDWRITE>1</WORLDWRITE>
    <WORLDEXECUTE>1</WORLDEXECUTE>

</FOLDERPERMISSIONS>
<JOBOWNER>briouser</JOBOWNER>
<JOBACCESSORS>

    <ACCESSOR>BrioPortal_Demo</ACCESSOR>

    <ROLE>RUN</ROLE>
</JOBACCESSORS>
<JOBUUID>MMHREMPID0101</JOBUUID>

</JOB>
</JOBMASKS>

```

Validating Brio Intelligence Migration

Brio Intelligence has two components, the OnDemand Server and the Broadcast Server. Each component has its own repository database and associated documents. The OnDemand Server can run as a standalone component or as a Brio Portal service. When the OnDemand Server is run as a Brio Portal service, the users, groups, and folders are part of the Brio Portal Repository.

Review the following sections for information on:

- [Validating OnDemand Server \(ODS\) Migration](#)
- [Validating Broadcast Server \(BCS\) Migration](#)

Validating OnDemand Server (ODS) Migration

Use the checklist in [Table 20](#) to confirm that all required OnDemand Server components and objects have correctly migrated to the new Hyperion System 9 BI+ environment.

Table 20 OnDemand Server Migration Checklist

ODS Component	Explanation
<input type="checkbox"/> Users	<p>If you migrated ODS as a stand-alone component, users are migrated.</p> <p>If you did not migrate ODS as a stand-alone component (for BrioONE), the Brio Portal migration should have migrated the users.</p> <p>Inactive users and users using external authentication are not migrated. Check that the user attributes of users using external authentication migrated.</p>
<input type="checkbox"/> Groups	<p>If you migrated ODS as a stand-alone component, groups are migrated.</p> <p>If you did not migrate ODS as a stand-alone component (for BrioONE), the Migration Utility should have migrated the groups.</p> <p>Inactive groups are migrated as active groups.</p>
<input type="checkbox"/> Group attributes	<p>Group attributes are migrated. See “Mapping Access Privileges to Hyperion System 9 BI+” on page 39 for assigned group attributes.</p>
<input type="checkbox"/> Adaptive States	<p>Adaptive states for the documents are migrated to the new system.</p>
<input type="checkbox"/> Documents	<p>All BQY documents in the source system are migrated except those using password protection. The Migration Utility does not change OCE settings for BQY job output.</p> <p>BQY documents with mixed passthrough are migrated as two BQY documents, one with Passthrough mode and the other with No Passthrough mode.</p>
<input type="checkbox"/> Folders	<p>If you migrated ODS as a stand-alone component, all folders are moved to the target system. (Categories are called folders in Hyperion System 9 BI+.)</p> <p>If you did not migrate ODS as a stand-alone component (for BrioONE), the Brio Portal migration should have migrated the folders.</p>
<input type="checkbox"/> Job output	<p>Migrated BQY job output registered to ODS is treated as BQY documents in Hyperion System 9 BI+. If multiple outputs are associated with a job, they display in the main browse page as individual BQY documents rather than as job output beneath the related job. You can delete the job output in the form of BQY documents after new job output generates.</p>

Table 20 OnDemand Server Migration Checklist (Continued)

ODS Component	Explanation
<input type="checkbox"/> OCEs	OCE files are migrated to the new system. All processing OCEs should be moved from the ODS repository to the Hyperion System 9 BI+ Repository in the OCE category designated in the Migration Utility.
<input type="checkbox"/> ODS documents	BQY documents migrated from the OnDemand Server can be processed with the plug-in.
<input type="checkbox"/> Row-level security	If you migrated row-level security definitions, your tables are populated.
<input type="checkbox"/> Section OCE mapping	Existing ODS queries are still associated with the proper OCEs through the Browse module or Production Reporting Job Publisher.
<input type="checkbox"/> User name and password inside OCEs	The BQY files can connect using their designated OCEs. Attempt a test connection with a BQY file.

Validating Broadcast Server (BCS) Migration

Use the checklist in [Table 21](#) to confirm that all required Broadcast Server components and objects have correctly migrated to the new Hyperion System 9 BI+ environment.

Table 21 Broadcast Server Migration Checklist

BCS Component	Explanation
<input type="checkbox"/> Users	All active users are migrated. Inactive users are not migrated.
<input type="checkbox"/> Groups	Optionally migrate groups. If groups had a conflict in ODS, a warning should have been generated when running in pre-migration test mode. You should perform an additional pre-migration Test run after you resolve the conflict.
<input type="checkbox"/> Group/User attributes	See “Mapping Access Privileges to Hyperion System 9 BI+” on page 39 for assigned group and user attributes.
<input type="checkbox"/> BCS jobs	Scheduled BCS jobs are migrated without any issues and can be scheduled in the new environment without problems.
<input type="checkbox"/> Calendars	Calendar definitions in BCS are migrated to the new environment.
<input type="checkbox"/> Directories and printers	Directories and printers have the correct paths set up in your operating system. Groups that have access to directories and printers in the source system have view access to those same directories and printers in Hyperion System 9 BI+. Note: The version 8 server services need to run using a domain account that has access to migrated output directories and printers.
<input type="checkbox"/> External events	External events are migrated to the new environment.
<input type="checkbox"/> Jobs	Jobs defined in BCS are migrated to the new environment.
<input type="checkbox"/> Job cycles	All cycles associated with a job are migrated. Only the first of multiple Register-to-ODS actions in one cycle is migrated. If you did not perform the pre-migration steps to migrate these actions, you must add one cycle for each Register-to-ODS action.

Table 21 Broadcast Server Migration Checklist (*Continued*)

BCS Component		Explanation
<input type="checkbox"/>	Job intervals (three different levels)	Jobs scheduled to run regularly in the source system map to recurring time events in Hyperion System 9 BI+. Jobs scheduled to run ASAP in the source system do not map to a specified time event in Hyperion System 9 BI+. Jobs scheduled against events in the source system map to externally triggered events in Hyperion System 9 BI+.
<input type="checkbox"/>	Location of output files	Output files should be in a directory, printed, or saved to the Repository.
<input type="checkbox"/>	OCEs	All processing OCEs are moved from the BCS to the Repository in the OCE category designated in the Migration Utility. All migrated BCS OCEs have <code>_bcs</code> appended to their names. For example, a BCS OCE called Processing OCE in your source system is called Processing OCE_BCS in your Hyperion System 9 BI+ system.
<input type="checkbox"/>	Parameter lists	Parameter lists are migrated as personal.
<input type="checkbox"/>	Section OCE mapping	Scheduled BQY jobs have each query mapped to an OCE.

Validating Hyperion Analyzer Migration

Use the checklist in [Table 22](#) to confirm that all required Hyperion Analyzer components and objects have correctly migrated to the new Hyperion System 9 BI+ environment.

Table 22 Hyperion Analyzer Migration Checklist

BCS Component		Explanation
<input type="checkbox"/>	Users	All active users are migrated. Inactive users are not migrated.
<input type="checkbox"/>	Groups	All groups are migrated.
<input type="checkbox"/>	Group/User attributes	See “Mapping Access Privileges to Hyperion System 9 BI+” on page 37 for assigned group and user attributes.
<input type="checkbox"/>	Database Connections	All database connections are listed and are available to the reports and views.
<input type="checkbox"/>	Personal Variables	Personal variables for the users are migrated.
<input type="checkbox"/>	Reports	All reports can be run and edited.
<input type="checkbox"/>	Report Views	All reports and controls work for Report Views.
<input type="checkbox"/>	Report Group Templates	All reports are available to the Report Group. Links and URLs are available in the Report View.

Validating Hyperion Reports Migration

Use the checklist in [Table 23](#) to confirm that all required Hyperion Reports components and objects have correctly migrated to the new Hyperion System 9 BI+ environment.

Table 23 Hyperion Reports Migration Checklist

BCS Component	Explanation
<input type="checkbox"/> Users	All active users are migrated. Inactive users are not migrated.
<input type="checkbox"/> Groups	All groups are migrated. If errors arise the group will not migrate. You should perform an additional pre-migration Test run after you resolve the conflict.
<input type="checkbox"/> Group/User attributes	See “Mapping Access Privileges to Hyperion System 9 BI+” on page 39 for assigned group and user attributes.
<input type="checkbox"/> Batches	Can be scheduled and run appear in email, PDF, or the repository.
<input type="checkbox"/> Books	All the reports in the book are migrated and books can be run in either PDF or HTML mode.
<input type="checkbox"/> Database Connections	All database connections are migrated.
<input type="checkbox"/> Reports	Reports can be run in either PDF or HTML mode.
<input type="checkbox"/> Reports/Snapshots	All reports and snapshots are migrated.
<input type="checkbox"/> Row/Column Templates	Row/Column templates are migrated and are added to the correct reports.

Validating Hyperion Performance Suite Migration

Use the checklist in [Table 22](#) to confirm that Hyperion Performance Suite 8.x information has correctly migrated to the new Hyperion System 9 BI+ environment.

Table 24 Hyperion Performance Suite Migration Checklist

BCS Component	Explanation
<input type="checkbox"/> Users	<p>All active users are migrated. Inactive users are not migrated. (Active users must have their action set to <i>migrate</i> in the Migration Utility. See “Setting the Migration Action” on page 140 in the <i>Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, Web Analysis Migration Guide</i> for information on how to set the migration action for users.)</p> <p>User properties (first name, last name, description, email address) are correct for users mapped to new native users.</p> <p>Users are provisioned with the correct roles.</p>
<input type="checkbox"/> Groups	<p>All active groups are migrated. Inactive groups are not migrated. (Active groups must have their action set to <i>migrate</i> in the Migration Utility. See “Setting the Migration Action” on page 143 in the <i>Hyperion System 9 BI+ Financial Reporting, Interactive Reporting, Production Reporting, Web Analysis Migration Guide</i> for information on how to set the migration action for groups.)</p> <p>Group descriptions and user/group membership is correct for groups mapped to new native groups.</p> <p>Groups are provisioned with the correct roles.</p>

Table 24 Hyperion Performance Suite Migration Checklist (*Continued*)

BCS Component	Explanation
<input type="checkbox"/> User Defined Roles	User-defined roles must be manually created and manually assigned to users and groups.
<input type="checkbox"/> Repository Metadata	All repository metadata migrated to the new environment.
<input type="checkbox"/> Repository Files	The content of the system, folders, and files migrated to the new environment.
<input type="checkbox"/> Events	User subscriptions, notifications of events involving subscriptions, jobs, parameter lists for jobs, and exceptions migrated to the new environment.
<input type="checkbox"/> Authorization	Access control information for folders, documents, and resources is migrated correctly.

General Post Migration Steps

After you complete the migration, perform the tasks described in [Table 25](#) to ensure proper functionality in your new Hyperion System 9 BI+ system.

OPEN ISSUE: [Need to add Analyzer and Reports information.](#)

Table 25 Post-migration Checklist

Task	Explanation
<input type="checkbox"/> Enable publisher ratings for migrated Brio Portal jobs	Ratings are migrated, but they cannot be seen unless the Enable publisher ratings parameter is set in the Hyperion System 9 BI+ system properties.
<input type="checkbox"/> Review access control	Set access control on users, groups, and other resources according to your migration plan. Make sure to assign the Content Publisher role to any user who needs to view, modify, or publish in Hyperion System 9 BI+. Check that the proper access control is given on job output. Use the <code>jobPublishingMasksCreated.xml</code> file produced by the Migration Utility to check that the proper access control is set on job output in the new system. See “Sample jobPublishingMasksCreated.xml” on page 46 for a sample file.
<input type="checkbox"/> Modify the default Insight role	If you set a default Insight role in the <code>BI_Migrate.ini</code> file during migration, modify the Insight role to reflect the roles you want to give to users and groups in your new system. Hyperion recommends that you apply roles at the group level instead of the user level.
<input type="checkbox"/> Set up email for jobs	If you did not convert MAPI email addresses to SMTP addresses before migrating, you must do so now. MAPI email addresses are not supported in Hyperion System 9 BI+. You may need to set up an email server if you did not do so while installing Hyperion System 9 BI+.
<input type="checkbox"/> Set OCE attributes	Give appropriate access control to users who need to view, modify, and or publish OCEs. See “Mapping Access Privileges to Hyperion System 9 BI+” on page 39 for detail on ownership of migrated OCEs. Because alternate metadata OCEs are not migrated, reestablish the links to alternate metadata OCEs.
<input type="checkbox"/> Turn on RLS	If you migrated Row Level Security (RLS), you must manually turn it on in your new system.



Sample Migration Project Plan

The migration process typically includes a planning, assessment and design, testing, validation, and deployment phase. This appendix details a sample migration project plan.

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Identifying Tasks and Deliverables

Table 26 details the various tasks and identifies deliverables, along with the associated responsibility for a typical migration project. The Target Schedule is an estimate that may change based on information obtained during the initial requirements and analysis phases of the project or during the migration assessment phase as deemed necessary by the Migration Project Team.

Table 26 Sample Migration Project Plan

Project Phase	Milestone Tasks and Deliverables	Responsibility	Target Schedule
Migration Planning	<p>Gain a clear understanding of new features and functionality of Hyperion System 9 BI+; identify and gather resources, information, and material required for an Hyperion System 9 BI+ migration project; and introduce the project to key stakeholders. Tasks performed include:</p> <ul style="list-style-type: none"> • Understand the new features and functionalities of Hyperion System 9 BI+. • Gather business requirements. • Review business requirements and confirm project objectives, scope, and schedules. • Assemble project team, assign roles & responsibilities. • Identify resource requirements related to consulting services. • Identify training needs related to Hyperion System 9 BI+ and/or the migration process. 	Customer 100%	Customer dependent - ongoing
Migration Assessment and Design	<p>Gather information about the existing environment and future business intelligence needs. Tasks performed include:</p> <ul style="list-style-type: none"> • Review of the customers in the existing environment • Requirements gathering related to customer's future business intelligence needs • Technical architecture analysis • Hardware and software requirements • Production Server inventory - identify content to migrate • Server load analysis • Server outage analysis • Migration project plan • Identification of customer's training needs • Deliverables at this point should include: <ul style="list-style-type: none"> • Complete existing environment Assessment document • Complete migration project plan 	Customer 50% Local Consulting Resource (1 FTE) 50%	1 - 2 weeks

Table 26 Sample Migration Project Plan (Continued)

Project Phase	Milestone Tasks and Deliverables	Responsibility	Target Schedule
Migration	Perform migration from the existing environment to the new Hyperion System 9 BI+ environment. Tasks performed include: <ul style="list-style-type: none"> ● Setting up a test environment ● Migrating in pre-migration mode ● Testing the migration ● Evaluating test results ● Resetting the test server to the original system ● Testing the migration again ● Performing the production migration ● Performing the post migration manual steps/customizations 	Customer 50% Local Consulting Resource (1 FTE) 50%	2 - 4 weeks
Post Migration Content Development	Develop new content to utilize the new Hyperion System 9 BI+ features and functionality. Tasks include: <ul style="list-style-type: none"> ● Develop dashboards, Intelligence documents, and SQR reports ● Configure security ● Develop content related to thin client 	Customer 50% Local Consulting Resource (1 FTE) 50%	Customer dependent – ongoing

Identifying Project Staff

Table 27 suggests what to consider as you put together a migration project staff. On the migration staff, include people who meet the following criteria:

Table 27 Project Staff

Staff Position	Description
System administrator	Possesses detailed knowledge of the operating environment and configuration details of existing systems and has authorized access to all relevant systems at your site. Responsible for ensuring that the environment is properly secured and backed up and that adequate restoration procedures are in place when required. Can provide the project team with the appropriate access and security levels
IT specialist	<p>Possesses detailed knowledge of the following IT technology and configuration details of existing systems and has authorized access to all relevant supporting service at your site.</p> <ul style="list-style-type: none"> ● Web server ● Database system ● Network ● Java ● Lightweight Directory Access Protocol (LDAP)/ADS
Business analysis	Understands the organization's business requirements and can translate these requirements to a generic solution that can be delivered using IT. Has detailed knowledge of the business operating environment and of the problem to be addressed.
Project manager	Has overall project management responsibility for ensuring the successful use of both internal and Hyperion resources.
Hyperion project specialist	Understands how the ODS, BCS, Intelligence Client, Portal, Reports, Analyzer, and HPSu 8.x documents are used, the business functions they serve, and the customizations that have been implemented.
Database/application specialist	Possesses skills and knowledge of the existing client systems and complimentary products to integrate into the Hyperion implementation. These may be products such as: RDBMS, proprietary client systems, desktop applications, and others.
Consultant support	Provides detailed Hyperion product expertise, domain expertise, and experience associated with multiple previous implementations of the Hyperion product set. Typically works as an integral member of the project team to ensure that Hyperion products are successfully deployed in line with an agreed plan to meet the business needs. If required, the consultant or an associate serves as a business consultant to translate the needs of the client from a business problem to a Hyperion solution based on vertical market and vertical application experience.

Breaking Down the Workload

Table 28 depicts a breakdown of workload for each resource for the major phases of the migration project.

Table 28 Workload Breakdown

Estimated Workloads During the Project	Migration Planning (ongoing)	Migration Assessment (1 to 2 weeks)	Migration (2 to 4 weeks)	On-going Production
Project Manager	50%	50%	25%	0%
IT Specialist	25%	50%	25%	20 - 25%
System Administrator	25%	50%	25%	25%
Business Analyst	25%	25%	50%	25%
Brio/Hyperion Project Specialists	25%	50%	25%	0%
Database Administrator	5%	5%	20%	5%
Consultant	0%	100%	100%	0%



Limitations

This appendix discusses functionality that was present in prior versions that has no equivalent method in Hyperion System 9 BI+.

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	Hyperion Reports	63
	Hyperion Performance Suite	65
	Carry Forward from Hyperion Performance Suite 8.3	70

General

Table 29 describes the general limitations as a result of migrating to Hyperion System 9 BI+.

Table 29 General

Limitation	Impact	Workaround
<ul style="list-style-type: none"> No password migration from native authentication systems Unlike the previous Migration Utility, passwords will not be migrated for native authentication systems. Instead they will be set to a default or randomly-generated password depending on the configurable setting in the Migration Utility. The password algorithm for Hyperion System 9 Shared Services is not the same as in the prior versions (Reports, Analyzer, HPSU etc.). As a result, the encrypted passwords from the previous version are not readable by the new native authentication system; namely, OpenLDAP. 	<p>Affects customers using native authentication systems in previous versions.</p>	<p>Map users to an external provider.</p> <p>Note: Deployments that wish to continue with a native authentication system can choose to randomly generate passwords to be stored in a password file. Users must then be notified about the new passwords. A sample program is provided with the Migration Utility that reads the password file and sends out notifications to affected users. Based on the sample, administrators can use any language to create their own program.</p>
<ul style="list-style-type: none"> No administration API for user provisioning In Hyperion System 9 BI+, APIs are not supported in which users are created in the new User Provisioning module using API calls from the Hyperion Performance Suite SDK. Additionally creation of groups and provisioning of users/groups is not allowed. 	<p>Affects systems using Hyperion Analyzer, Hyperion Reports, or Hyperion Performance Suite.</p>	<p>None at present.</p>

Hyperion Analyzer

Table 30 describes the limitations encountered when migrating Hyperion Analyzer to Hyperion System 9 BI+.

Table 30 Hyperion Analyzer

Limitation	Impact	Workaround
<ul style="list-style-type: none"> No support for links in Workspace Similar to UNIX symbolic links. A link is pointer to an object that represents the object based on the link's location in the repository. Links are associated to the object by the objects ID and URL. 	Affects customers using Hyperion Analyzer 7.2.x.	None
<ul style="list-style-type: none"> No "batteries included" repository (MySQL) Prior versions of Hyperion Analyzer were shipped with MySQL for the repository. This is not true for Hyperion System 9 BI+. 	Affects customers using Hyperion Analyzer 7.2.	None
<ul style="list-style-type: none"> Removal of Granular Roles Hyperion Analyzer 7.2 had granular roles for POV and PV separately. In Hyperion System 9 BI+, the granular roles are now one role. 	Affects customers using Hyperion Analyzer 7.2.	None
<ul style="list-style-type: none"> Opening a presentation is different between Workspace and Studio Opening a "presentation" does not open the first report with direct access to others via Tabs. 	Affects customers using Hyperion Analyzer 7.0.1 and 7.2.	None
<ul style="list-style-type: none"> Desktop functionality between Analyzer 6/7.x HTML Web Client and Workspace is different The Workspace desktop display is different from the Hyperion Analyzer Web Client and the Web Analysis Studio. 	Affects customers using Hyperion Analyzer 6.x and 7.x.	None
<ul style="list-style-type: none"> No tag library (token) or action support to customize Hyperion Analyzer HTML Web Client There is no longer a tab library or URL actions. 	Affects customers using Hyperion Analyzer 6.x and 7.x.	None
<ul style="list-style-type: none"> No Web Publish or Batch Utility to save reports as HTML Web publish saves a report to HTML output and batch utility can do the same for more that one report. 	Affects customers using Hyperion Analyzer 6.x and 7.x.	None

Table 30 Hyperion Analyzer (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> Analyzer Standalone Windows client no longer exists There is no longer a Windows client. 	Affects customers using Hyperion Analyzer 6.x and 7.x.	None
<ul style="list-style-type: none"> Startup options and default folder locations different between Studio and Workspace The startup options that are applied in Web Analysis Studio are no longer applicable to the thin client (Workspace). 	Affects customers using Hyperion Analyzer 6.x and 7.x.	None
<ul style="list-style-type: none"> No ARU/XML to create or modify users Customers can no longer create and manage users with an import XML file. 	Affects customers using Hyperion Analyzer 6.x and 7.x.	None
<ul style="list-style-type: none"> Cannot backup/restore RDBMS repository. Requires file system backup In past releases you had to backup the RDBMS database in order to backup Analyzer's repository. 	Affects customers using Hyperion Analyzer 6.x and 7.x.	None
<ul style="list-style-type: none"> Permissions no longer supported In Hyperion Analyzer 7.x, it was possible to assign users and groups discrete permissions for objects. For example, you could assign the Write permission to a user without assigning the Read permission. In Hyperion System 9 BI+, the permissions are cumulative. For example, the Modify permission includes the View permission. Thus, if a user was assigned just the Write permission for an object in Hyperion Analyzer 7.x, in Hyperion System 9 BI+ they user will also be able to view the object. For migrated systems, this is a difference in behavior. In addition, you can no longer bypass intermediate folders to access lower level folders. You must give explicit permission on the intermediate folders to have access to the lower level folders. 	Affects customers using Hyperion Analyzer 7.x.	None

Hyperion Reports

Table 31 describes the limitations encountered when migrating Hyperion Reports to Hyperion System 9 BI+.

Table 31 Hyperion Reports

Limitation	Impact	Workaround
<ul style="list-style-type: none"> Cannot copy and paste files (including reports) or folders in the Repository In previous releases, you could copy and paste reports objects in the Repository, both in the Win32 client and in the Web client (version 7.2 and above). 	Affects customers using all previous versions of Hyperion Reports.	Reports: Open a Report in the Win32 client and select File > Save As . Books and Batches: Open Book or Batch in the Workspace and select File > Save As .
<ul style="list-style-type: none"> Removal of Win32 Client Repository Maintenance functionality The following areas of Repository Maintenance functionality no longer appear in the Win32 client: <ul style="list-style-type: none"> Access Privilege Changes Accessible in Workspace only. Copy, Cut, Paste, Delete, and Duplicate Objects Accessible in Workspace only, except for "Copy". Ability to Create New Folder from File > Save or File > Open dialog boxes Accessible in Workspace only. 	Affects customers using all previous versions of Reports. This is a minor impact since most Win32 client functionality, except for Reports design, has moved to the thin client.	Perform Repository maintenance in Workspace instead of in the Win32 client.
<ul style="list-style-type: none"> Removal of Admin menu from the Win32 client Security maintenance and Hub registration have been removed from the Win32 client. 	Affects customers using all previous versions of Reports. This is a minor impact since most Win32 client functionality, except for Reports design, has moved to the thin client.	Perform Security maintenance in Workspace instead of in the Win32 client.
<ul style="list-style-type: none"> Email addresses configured in Hyperion System 9 Shared Services and not in Preferences You can still send email links as in the previous releases; however, you must configure the sender's email address in Hyperion System 9 Shared Services and not in Preferences. 	Affects customers using all previous versions of Reports.	Configure the sender's email addresses in Hyperion System 9 Shared Services.

Table 31 Hyperion Reports (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> ● Character support for file/folder names has changed Previous version object names for Reports will be migrated and supported going forward. These object names will display and can be accessed in Workspace. SmartCuts for the object names with the unsupported characters, however, will not be displayed and will not work. The following characters are not allowed in a folder name: ! @ # \$ % + \ : " / < > , ? The following characters are not allowed in an object name: @ # \$ \ : " , / ? Going forward, Workspace will enforce that object names (for new objects created like folders, documents, etc.) do not contain unsupported characters. 	<p>Affects customers using all previous versions of Reports.</p>	<p>To make SmartCuts work for previous version objects with unsupported characters in the Workspace, modify the object name to use characters that are allowed.</p>
<ul style="list-style-type: none"> ● Multiple language support for the Repository not included in this release Currently, Foundation does not provide multi-lingual support, in either the services or the servlets. Locales for each user are not stored, and the browser locale is not used. Currently, Reports supports multiple languages in the database/Repository. In other words, one Report can have a Japanese name and another report can have a Russian name, where both reports can exist in the same folder. This is accomplished by Reports encoding the Report Name (and other info like Description) in UTF-8 format before the object is stored in the database. This requirement is necessary where it is common to have different Reports saved in different languages in the same repository. 	<p>Affects customers using all previous versions of Reports.</p>	<p>None</p>

Hyperion Performance Suite

Table 32 describes the limitations encountered when migrating Hyperion Performance Suite (Brio Intelligence, Brio Portal, and SQR) to Hyperion System 9 BI+.

Table 32 Hyperion Performance Suite (Brio Intelligence, Brio Portal, and SQR)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> New content indicator discontinued In previous versions, an icon indicated if a new object had been added to the system. The new user interface does not display an icon to notify users of new content. 	Affects customers using Hyperion Performance Suite.	Sort using the date and time column.
<ul style="list-style-type: none"> No Migration Utility platform support for HPUX/Linux There is no platform support for HPUX/Linux. 	Affects customers using Hyperion Performance Suite.	Run the Migration Utility on a machine using a supported platform (such as Windows or Solaris).
<ul style="list-style-type: none"> Extended Services no longer supported Extended Services will not function in Hyperion System 9 BI+. In previous versions, this feature allowed partners, services, or customers to extend the capability of servlets and customize them to their environment. 	Affects customers using Hyperion Performance Suite.	None
<ul style="list-style-type: none"> Hyperion System 9 BI+ servlet hardwired to a single GSM Every Web application deployment will be hardwired to a GSM. Users can no longer select a Web deployment and connect to a GSM of their choice. As a result, test and production deployments will have their own instances of application servers which cannot be used interchangeably. 	Affects customers using Hyperion Performance Suite.	None
<ul style="list-style-type: none"> Manual provisioning of groups in automatic mode In previous versions, systems configured for automatic mode did not require manually provisioning of users or groups. In Hyperion System 9 BI+, new groups must be manually provisioned. (You do not need to manually provision users in the group.) 	Affects customers using Hyperion Performance Suite.	A partial workaround is to provision the World group. All users are members of this group and can login. You must still individually provision groups.

Table 32 Hyperion Performance Suite (Brio Intelligence, Brio Portal, and SQR) (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> No support for reporting usage tracking data by group In Hyperion Performance Suite, you could create usage tracking reports to track events by named groups. Since group information is no longer part of Hyperion System 9 BI+, the underlying views are no longer valid and will not include group information. 	Affects customers using Hyperion Performance Suite.	None
<ul style="list-style-type: none"> No driver support of paging for Active Directory and LDAP There is no longer any driver support for paging Active Directory and LDAP. 	Affects customers using Hyperion Performance Suite.	None
<ul style="list-style-type: none"> Selective provisioning of users in external groups is not allowed if the users is a member of a provisioned group Hyperion System 9 Shared Services currently has no functionality for selectively choosing which users to provision (equivalent to Hyperion Performance Suite manual import of users). If a group is provisioned, all users in the group are automatically provisioned. 	Affects customers using Hyperion Performance Suite. This an issue for migrated systems that are set up in manual mode since more users will have access after migration than before migration.	Provision users individually. Then during migration, map external groups to new native groups.
<ul style="list-style-type: none"> Copy user feature not available In previous versions of Hyperion Performance Suite, the copy feature allowed administrators to easily create users with same the group and role information. By changing the basic properties like username and password from the copied user, you could create a new user with the same roles and group memberships. Administrators could also edit any of the roles or group information. 	Affects customers using Hyperion Performance Suite.	None
<ul style="list-style-type: none"> No support for tracking ancestor groups In User Provisioning, there is no way to determine what groups a given group is a member of. 	Affects customers using Hyperion Performance Suite.	None

Table 32 Hyperion Performance Suite (Brio Intelligence, Brio Portal, and SQR) (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> Cannot deactivate users, groups, and roles. You can only delete them. When you deactivate groups and roles, it makes them unavailable for assignment to users, and they are not displayed in the access control screen for assigning permissions. The group and role association for re-activated users is retained. 	Affects customers using Hyperion Performance Suite.	None
<ul style="list-style-type: none"> Existing Smartforms do not work in Hyperion System 9 BI+ Smartforms are parameter collection forms used by SQR programs. Due to the conversion of the relevant screens from templates to JSPs, the existing Smartforms will not work in the new environment. Note: The Migration Utility removes the association of the Smartform and the SQR program. This ensures the default parameter collection screen is generated when you run the program post migration. 	Affects customers using Hyperion Performance Suite.	Create new Smartforms using the new JSP template.
<ul style="list-style-type: none"> No 508 compliance Workspace will not be 508 compliant. 	Affects customers using Hyperion Performance Suite.	None
<ul style="list-style-type: none"> No option to open content in a new window without "framework" Hyperion System 9 BI+ does not have an option to open content in a new window without "framework." 	Affects customers using Hyperion Performance Suite.	None
<ul style="list-style-type: none"> No circular group support Circular references are groups that contain other groups in a cyclical relationship. For example, Group A contains Group B, which contains Group C, which contains Group A. The User Provisioning module does not support circular references in groups. Note: The Migration Utility removes any circular references in the source system before migrating content to Hyperion System 9 Shared Services and the Hyperion System 9 BI+ Repository. 	Affects customers using Hyperion Performance Suite.	Remove circular group references prior to migration.

Table 32 Hyperion Performance Suite (Brio Intelligence, Brio Portal, and SQR) (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> ● No grouping for job run outputs Hyperion System 9 BI+ does not group job outputs along with the job name. The job outputs appear as separate entries using the fixed text “Output from...” before the job name. In previous versions, every job displayed the most current version of job output directly below the link for the job name. In Hyperion System 9 BI+, when a job has more than one output type (for example, PDF or XML), you must click on the job output to select the output type. Previous versions did not have this additional screen for output selection. 	<p>Affects customers using Hyperion Performance Suite.</p>	<p>None</p>
<ul style="list-style-type: none"> ● No support for delegated administration Delegated administration allows non-administrative users to be granted limited access to administration functionality. Delegated administration is implemented by applying access control on users, groups, and roles so that users with limited administrative capabilities can only access the users, groups, and roles as specified by the Administrator. Hyperion System 9 BI+ does not support access control on users, groups and roles. 	<p>Affects customers using Hyperion Performance Suite.</p>	<p>None</p>
<ul style="list-style-type: none"> ● No database authentication driver support Hyperion System 9 BI+ does not support database security as an external authentication source. 	<p>Affects customers using Hyperion Performance Suite.</p>	<p>None</p>

Table 32 Hyperion Performance Suite (Brio Intelligence, Brio Portal, and SQR) (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> ● Cannot specify default user roles Previous versions of Hyperion Performance Suite allowed an administrator to assign roles to the WORLD group. These roles were then granted to all users who had access to Hyperion Performance Suite. For example, you could set up your system to manually import users, and all users imported would automatically inherit the roles assigned to the WORLD group. In Hyperion System 9 BI+, however, provisioning the WORLD group gives all users access to Hyperion System 9 BI+. As a result, provisioning of the WORLD group may not be desirable. 	<p>Affects customers using Hyperion Performance Suite.</p>	<ul style="list-style-type: none"> ● Create a group for all Hyperion System 9 BI+ users. Always add new users to this group and assign them default roles. ● The Migration Utility includes a special group to which all migrated users and groups belong to. This group is assigned the roles assigned to the WORLD group. New users or groups added after migration must be added explicitly to this group, in order for them to be granted these default roles.
<ul style="list-style-type: none"> ● Cannot change role containment relationships for pre-defined roles Previous versions of Hyperion Performance Suite allowed you to modify role containment for pre-defined roles. Changes in role containment relationships are not migrated and cannot be changed after migration. 	<p>Affects customers using Hyperion Performance Suite.</p>	<p>None</p>
<ul style="list-style-type: none"> ● User-defined roles not migrated The Migration Utility does not migrate user-defined roles. 	<p>Affects customers using Hyperion Performance Suite.</p>	<p>Create user-defined roles in Hyperion System 9 BI+ and assign permissions for these roles accordingly.</p>
<ul style="list-style-type: none"> ● No support for custom authentication drivers Hyperion Performance Suite provided APIs to create custom authentication drivers. Hyperion System 9 BI+ does not provide these APIs. 	<p>Affects customers using Hyperion Performance Suite.</p>	<p>None</p>

Table 32 Hyperion Performance Suite (Brio Intelligence, Brio Portal, and SQR) (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> No support for NIS drivers Hyperion Performance Suite supported NIS drivers for external authentication. Hyperion System 9 BI+ does not support these drivers. 	Affects customers using Hyperion Performance Suite.	Use supported external providers or native drivers for OpenLDAP.
<ul style="list-style-type: none"> Primary group no longer retrieved for MSAD users The Hyperion Performance Suite MSAD Authentication Driver returned a user's primary group. The Hyperion System 9 Shared Services driver does not return the primary group. This may affect existing roles and access level. 	Affects customers using Hyperion Performance Suite.	None

Carry Forward from Hyperion Performance Suite 8.3

Table 33 describes the limitations carried forward from Hyperion Performance Suite 8.3.

Table 33 Carry Forward from Hyperion Performance Suite 8.3

Limitation	Impact	Workaround
<ul style="list-style-type: none"> Cannot publish password-protected BQY files You can no longer password protect BQY files. 	Affects customers using Brio Intelligence 6.x.	Remove password protection before publishing.
<ul style="list-style-type: none"> Cannot have cascading limit values in scheduled jobs The job limits screen in Hyperion Performance Suite and Hyperion System 9 BI+ does not allow users to provide cascading limits even if they are defined in the BQY document. Example: Show cities based on State selected. If limit 1 is State, and you select California, the available choices for limit 2 should be the cities of California such as San Francisco, Los Angeles etc. 	Affects customers using Brio Intelligence 6.x.	None
<ul style="list-style-type: none"> No job support for MAPI/Exchange as a mail server The MAPI/Exchange server is not supported for sending emails from the Job Service. Currently, only SMTP/ASMTMP servers are supported. 	Affects customers using Brio Intelligence 6.x.	None

Table 33 Carry Forward from Hyperion Performance Suite 8.3 (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none"> ● Broadcast Server Customized Limit prompts do not appear When a filter (limit) is customized, setting the value of the filter as a job parameter does not honor the customizations. For example, if you set a filter to not be ignored, to not include nulls, or to only pick from the values in the database, these restrictions would still be permitted when specifying job parameters. 	Affects customers using Brio Intelligence 6.x.	None
<ul style="list-style-type: none"> ● Cannot create and test OCEs directly on a UNIX server platform Without a UNIX “fat client”, you cannot create an OCE on a UNIX platform and test connectivity. In Hyperion System 9 BI+, you must create the OCE on a Windows platform, where a connection with the same data source name exists; publish the resulting OCE; and run a job with a UNIX-deployed DAS to verify it works. 	Affects customers using Brio Intelligence 6.x.	None
<ul style="list-style-type: none"> ● No equivalent of 6x ODS System Monitor/Active Users screen to allows shutdown of processes The OnDemand Server provided a screen to monitor active processes. Portal 7.x had a utility to see the active users in the system. Hyperion System 9 BI+ does not provide an equivalent method. 	Affects customers using Brio Intelligence 6.x and Brio Portal 7.x.	None
<ul style="list-style-type: none"> ● Web publishing/job scheduling in Hyperion System 9 BI+ not possible from Designer The Designer client in 6.x allowed scheduling without connecting to the Web. This functionality was lost in the move to Hyperion Performance Suite. 	Affects customers using Brio Intelligence 6.x.	None
<ul style="list-style-type: none"> ● Cannot add HTML links in an object's description field It used to be possible to add HTML links in the description field using the HTML tags the documents published in the server. 	Affects customers using Brio Portal 7.x.	None

Table 33 Carry Forward from Hyperion Performance Suite 8.3 (Continued)

Limitation	Impact	Workaround
<ul style="list-style-type: none">● When assigning roles and groups for Insight users, the jump between Intelligence Dynamic Viewer and Intelligence Analyzer is too severe When assigning roles and groups for Insight users, the jump between Intelligence Dynamic Viewer and Intelligence Analyzer is too severe. This is a result of the inability to assign a default adaptive state to a group.	Affects customers using Brio Intelligence 6.x.	None
<ul style="list-style-type: none">● Cannot filter search results by mime type You can no longer use mime types to perform a search.	Affects customers using Brio Portal 7.x.	None

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