

Oracle® Cloud

Migrating from Oracle Analytics Cloud - Classic to Oracle Analytics Server



F77661-02
March 2024



Oracle Cloud Migrating from Oracle Analytics Cloud - Classic to Oracle Analytics Server,

F77661-02

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Preface

Learn how to migrate content from Oracle Analytics Cloud - Classic instances on Oracle Cloud Infrastructure (Gen 1) to Oracle Analytics Server.

Topics:

- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Documents](#)
- [Conventions](#)

Audience

This document is intended for system administrators who migrate content from Oracle Analytics Cloud - Classic instances on Oracle Cloud Infrastructure (Gen 1) to Oracle Analytics Server.

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Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Documents

For a full list of guides, refer to the Books tab on Oracle Analytics Server Help Center.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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Even if your skins and styles are different than those shown in the videos and images, the product behavior and techniques shown and demonstrated are the same.

1

Learn About Migrating to Oracle Analytics Server

Learn about how to migrate content from your existing Oracle Analytics Cloud - Classic on Oracle Cloud Infrastructure (Gen 1) to Oracle Analytics Server.

Topics:

- [About the Migration Scope](#)
- [About the Migration Task Flow](#)
- [About the Migration Tools](#)
- [Understand Key Differences](#)

About the Migration Scope

Before migrating content from an Oracle Analytics Cloud - Classic instance on Oracle Cloud Infrastructure (Gen 1) to Oracle Analytics Server, consider the scope and constraints of this migration path.

Summary

Migration Requirement	Scope
Source environment	<ul style="list-style-type: none">• Oracle Analytics Cloud - Classic instance deployed with one of the following feature sets:<ul style="list-style-type: none">– Data Visualization– Business Intelligence• Oracle Analytics Cloud 6.4 (latest patch)
Target environment	Oracle Analytics Server 2022 (6.4) or later. Deployment options: <ul style="list-style-type: none">• On premises• On Oracle Cloud (using Oracle Analytics Server on Oracle Cloud Marketplace) The target environment must be the same version as the source (Oracle Analytics Server 2022 (6.4)) or a later version, such as Oracle Analytics Server 2023 (7.0).
License for Oracle Analytics Server	<ul style="list-style-type: none">• On premises: Oracle on-premises license required.• On Oracle Cloud: Use Universal Credits or Bring Your Own License (BYOL) that you currently use with Oracle Analytics Cloud.

Migration scenarios covered in this Guide

With Oracle Analytics Cloud on Oracle Cloud Infrastructure (Gen 1), you can deploy services with several different feature sets:

- Data Visualization
- Business Intelligence (includes Data Visualization)
- Essbase

This Guide only describes how to migrate services deployed with Data Visualization or Business Intelligence.

Not covered in this Guide

This Guide doesn't describe how to migrate Oracle Analytics Cloud instances deployed with the Essbase feature set or non-Oracle Analytics Cloud artifacts, such as associated databases, security configuration, and so on. If required, you must migrate non-Oracle Analytics Cloud artifacts separately or re-create them in your Oracle Analytics Server environment.

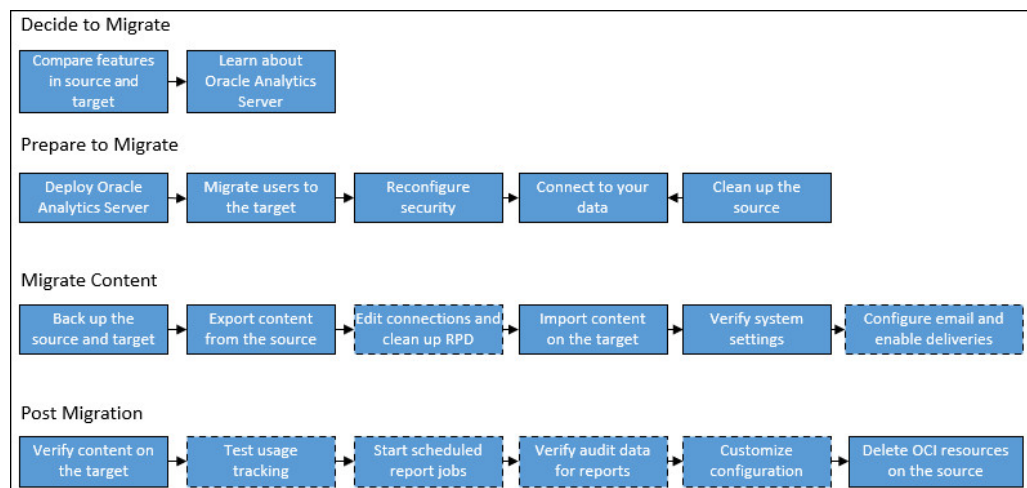
This Guide assumes you subscribe to Oracle Analytics Cloud with Universal Credits. The instructions in this guide don't apply if you have a non-metered, user-based subscription (Oracle Analytics Cloud Subscription).

About the Migration Task Flow

You use migration tools to migrate content from Oracle Analytics Cloud - Classic instances to Oracle Analytics Server. Before you start the migration, you need to prepare and set up a target Oracle Analytics Server environment on premises or on Oracle Cloud. Here's what you need to do.

- [Decide to Migrate](#)
- [Prepare to Migrate](#)
- [Migrate Your Service](#)
- [Complete Post-Migration Tasks](#)

Overview



Decide to migrate

Task	Description	More Information
Compare features in the source and target	Understand key differences between Oracle Analytics Cloud and Oracle Analytics Server and compare feature availability.	Learn About Migrating to Oracle Analytics Server
Learn about migrating to Oracle Analytics Server	Learn about the migration process and tools.	Learn About Migrating to Oracle Analytics Server

Prepare to Migrate

Task	Description	More Information
Deploy Oracle Analytics Server	Plan, install, and configure Oracle Analytics Server.	Install and Configure Oracle Analytics Server
Migrate users to the target	Migrate users and groups from the source identity store.	Migrate Users and Roles to Oracle Analytics Server
Reconfigure single-sign on	(Optional) If Single Sign-on (SSO) is configured in your source environment, set up SSO in your target environment.	Enable SSO Authentication in Oracle Analytics Server
Integrate with external identity providers	(Optional) Integrate with external authentication providers in your target environment. For example, Oracle Internet Directory, Microsoft Active Directory, and so on.	Use Alternative Authentication Providers with Oracle Analytics Server
Connect to your data	Reconfigure connection information on the target Oracle Analytics Server. If your data is stored in a database on Oracle Cloud Infrastructure Classic or Google BigQuery you must move the data to a different database.	Connect to Your Data
Add Oracle Analytics Server IP address to allowlists	If you registered your Oracle Analytics Cloud IP address in any data source allowlists, you must perform this task again for Oracle Analytics Server.	Include the IP Address of Oracle Analytics Server in Allowlists
Clean up source content	Delete old or redundant content and remove extinct users to make the migration smoother and faster.	Clean Up Your Source Environment

Migrate Content

Task	Description	More Information
Understand snapshot options	Understand what you can include or exclude when you take a snapshot.	Understand Snapshot Options
Check your target is ready for migration and take a backup	Verify that the required users and roles are available in your target service and take a snapshot in case you need to roll back.	Back Up Your Target System Before Migration
Take a snapshot of the source	Capture the content you want to migrate on the source system.	Take a Snapshot on the Source

Task	Description	More Information
Export content from the source	Download the snapshot that you want to migrate to your local file system.	Download the Snapshot
Edit connections and clean up the semantic model file (RPD)	Update connection strings in your semantic model file (RPD) and remove content you don't want to migrate.	Clean Up and Reconfigure Your Semantic Model File (RPD)
Import content on the target	Sign in to Oracle Analytics Server and import the snapshot.	Import the Snapshot on the Target
Restore the snapshot content	Select the newly uploaded snapshot in the list of saved snapshots and restore the content in the snapshot.	Restore the Snapshot on the Target
Reconfigure system settings	Verify various administrative settings on the target.	Configure System Settings Configure Publisher Settings
Activate deliveries	Configure an email server for Oracle Analytics Server. Disable deliveries on the source and start delivering content from the target Oracle Analytics Server.	Configure Email and Agents Restore and Enable Delivery Schedules

Complete Post-Migration Tasks

Task	Description	More Information
Test the migrated content	Check the content you migrated is available on Oracle Analytics Server and everything works as you expect.	Verify Migrated Content
Test usage tracking	(Optional) Verify usage tracking is working in Oracle Analytics Server.	Test Usage Tracking
Resume scheduled pixel-perfect report jobs	(Optional) Disable any pixel-perfect report jobs that are currently scheduled on the source and start the scheduled report jobs on the target Oracle Analytics Server.	Restart Scheduled Jobs for Pixel-Perfect Reports
Test auditing data for pixel-perfect reports	(Optional) Verify auditing information for pixel-perfect reports is working in Oracle Analytics Server.	Test Audit Data for Pixel-Perfect Reports
Customize settings in configuration files	(Optional) Replicate any changes that you made to configuration files in Oracle Analytics Server.	Customize Settings in Configuration Files
Clean up resources on Oracle Cloud Infrastructure	Remove any resources that you don't need.	Clean Up Resources in Oracle Cloud Infrastructure

About the Migration Tools

You use a snapshot to migrate your Oracle Analytics Cloud - Classic instance on Oracle Cloud Infrastructure (Gen 1) to Oracle Analytics Server.

- **Snapshots:** Migrates content and settings from your source Oracle Analytics Cloud instance to Oracle Analytics Server.

 **Note:**

Snapshots don't include data files, such as spreadsheets, that users uploaded to Oracle Analytics Cloud to create datasets. Similarly, custom map layers and map backgrounds that users upload to enhance visualizations aren't included in snapshots.

- **Model Administration Tool:** Download the latest Oracle Analytics client tools to modify connection information in your semantic model file (RPD) and perform other cleanup tasks before you migrate to Oracle Analytics Server.

Understand Key Differences

Oracle Analytics Cloud and Oracle Analytics Server are built on the same technology and offer very similar capabilities. However, there are a few, key differences.

Update Frequency

- **Oracle Analytics Cloud (every 2 months)** - Oracle updates Oracle Analytics Cloud on Gen 2 about every two months with new features and bug fixes. The update process is automatic, making the process seamless for users.
- **Oracle Analytics Server (every 12 months)** - Updates for Oracle Analytics Server are released less often, typically with a 12-month time frame. Customers must upgrade their Oracle Analytics Server environment themselves when an update become available.

If access to the very latest Oracle Analytics features is important, Oracle recommends you use Oracle Analytics Cloud on Gen 2.

Data Modeler

Oracle Analytics Cloud - Enterprise Edition includes *Data Modeler*, a browser-based semantic data modeler that's easy-to-use, and offers simple modeling features. If you currently use Data Modeler, your semantic models display as subject areas that you can use in visualizations, dashboards, and analyses.

Data Modeler isn't available in Oracle Analytics Server. In Oracle Analytics Server, you use *Oracle BI Administration Tool* to develop semantic models so you'll need to learn how to use a different tool. However, you don't have to start from scratch, as you can export your current semantic model to a RPD file that the *Administration Tool* understands.

Oracle BI Administration Tool supports some complex modeling features that aren't available with Data Modeler, such as multi-source federation and automatic query re-direction.

Configuration File Customization

In Oracle Analytics Cloud, administrators use the Console to configure system-level properties. You use the Console in Oracle Analytics Server too, but you can also modify additional settings by directly editing various configuration files. For example:

- `NQSConfig.ini` (Oracle BI Server)
- `instanceconfig.xml` (Oracle BI Presentation Services)
- `objh.properties` (JavaHost)
- `config.xml` (JavaHost)

- `bridgeconfig.properties` (Presentation Services Plug-in)

For a full list of files and properties you can configure in Oracle Analytics Server, see Configuration File Settings.

Feature Differences

Oracle Analytics Server includes most of the features available in Oracle Analytics Cloud but there are some differences. For example, Oracle Analytics Server doesn't support data replication or natural language generation (NLG). For a detailed list, see [Feature Availability and Comparison with Oracle Analytics Cloud](#).

Feature Availability and Comparison with Oracle Analytics Cloud

Oracle Analytics Server includes most of the features available in Oracle Analytics Cloud.

- [System Configuration](#)
- [Governed Analytics](#)
- [Self-Service Analytics](#)
- [Augmented Analytics](#)
- [Data Connectors](#)

System Configuration

Oracle Analytics Cloud	Oracle Analytics Server	More Information
Mail server configuration using Oracle Analytics Cloud Console	Mail server configuration using Fusion Middleware Control.	Use Fusion Middleware Control to Configure Email Settings that Affect Agents

Governed Analytics

Oracle Analytics Cloud	Oracle Analytics Server	More Information
Corporate analytics dashboards	Yes	Build Analyses and Dashboards in Oracle Analytics Server
Pixel-perfect reports	Yes	Design and Publish Pixel-Perfect Reports in Oracle Analytics Server
Enterprise semantic models	Yes	Oracle Analytics Data Modeling Tools In Oracle Analytics Cloud, you use either Semantic Modeler or Model Administration Tool to build semantic models. In Oracle Analytics Server you can use either Semantic Modeler or Model Administration Tool to build semantic models.
Role-based access control	Yes	Share Your Content with Others

Oracle Analytics Cloud	Oracle Analytics Server	More Information
Data replication	No	Data replication requires integration with Oracle Cloud Infrastructure storage, which is only available with Oracle Analytics Cloud.

Self-Service Analytics

Oracle Analytics Cloud	Oracle Analytics Server	More Information
Data preparation	Yes	Prepare Datasets for Analysis
Data visualization	Yes	Explore, Visualize, and Analyze Data
Storytelling	Yes	Build Stories
Sharing and collaboration	Yes	Import and Share Workbooks
Mobile exploration	Yes * ¹	View Content on Mobile Devices

¹ *Mobile Web only

Augmented Analytics

Oracle Analytics Cloud	Oracle Analytics Server	More Information
Natural language and voice-activated search	Yes	Find and Explore Your Content
Natural language generation	No	-
Data enrichment	Yes	Data Profiles and Semantic Recommendations
One click "Explain"	Yes	Analyze Data with Explain
Machine learning for predictive analytics	Yes	Train and Apply Oracle Analytics Predictive Models

Data Connectors

Like Oracle Analytics Cloud, Oracle Analytics Server gives you access to your data, regardless of the source or location. Oracle ensures you have access to hybrid data—whether it's on premise, in the cloud, or on your desktop:

- Oracle Databases
- Oracle Applications
- Third Party Data Sources
- Files (CSV and XLSX)

For a full list of the data sources you can connect to, see:

- Supported Data Sources - RCU Schema
- Supported Data Sources - Visualizations, Reports, and Dashboards

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Prepare to Migrate from Oracle Analytics Cloud

Before you migrate content from Oracle Analytics Cloud to Oracle Analytics Server, plan and prepare for migration.

Task	Description	More Information
Deploy Oracle Analytics Server	Plan, install, and configure Oracle Analytics Server.	Install and Configure Oracle Analytics Server
Migrate users to the target	Migrate users and groups from the source identity store.	Migrate Users and Roles to Oracle Analytics Server
Reconfigure single-sign on	(Optional) If Single Sign-on (SSO) is configured in your source environment, set up SSO in your target environment.	Enable SSO Authentication in Oracle Analytics Server
Integrate with external identity providers	(Optional) Integrate with external authentication providers in your target environment. For example, Oracle Internet Directory, Microsoft Active Directory, and so on.	Use Alternative Authentication Providers with Oracle Analytics Server
Connect to your data	Reconfigure connection information on the target Oracle Analytics Server. If your data is stored in a database on Oracle Cloud Infrastructure Classic or Google BigQuery you must move the data to a different database.	Connect to Your Data
Add Oracle Analytics Server IP address to allowlists	If you registered your Oracle Analytics Cloud IP address in any data source allowlists, you must perform this task again for Oracle Analytics Server.	Include the IP Address of Oracle Analytics Server in Allowlists
Clean up source content	Delete old or redundant content and remove extinct users to make the migration smoother and faster.	Clean Up Your Source Environment

About Downtime Requirements

The migration process doesn't affect the availability of your existing Oracle Analytics Cloud - Classic instance on Oracle Cloud Infrastructure (Gen 1). Users can continue to sign in and use the service.



Note:

If you do allow users to access and make changes *after* you've taken the final snapshot for migration, you might need to take another snapshot and repeat the migration if you want to include any changes that they make.

After successfully migrating your content, you can reroute users to Oracle Analytics Server.


Install and Configure Oracle Analytics Server

Oracle Analytics Server is customer-managed software with several deployment options. You must install and configure Oracle Analytics Server before you migrate.

- **On-premises:** You can deploy Oracle Analytics Server on your own data center. Oracle Analytics Server can also be hosted in Oracle or non-Oracle cloud infrastructure, such as Microsoft Azure. See [Install and Configure Oracle Analytics Server](#).
- **Oracle Cloud Marketplace:** You can use the quick-deploy templates on Oracle Cloud Marketplace to accelerate the deployment of Oracle Analytics Server on Oracle Cloud Infrastructure as a hosted, customer-managed service. See [Deploy Oracle Analytics Server on Oracle Cloud](#).

Sign In and Verify Oracle Analytics Server

Use the administrator login credentials that you specified during installation to sign in to the Home page of Oracle Analytics Server. Verify that Oracle Analytics Server is up and running and you have access to the Console.

1. Sign in to Oracle Analytics Server with administrator credentials.
2. In the Home page, click the **Navigator** bar and click **Console**.
3. In the Console, click  in the top left corner.
4. Confirm you have access to **Users and Roles**, **Snapshots**, and **System Settings**, you'll use these pages to complete the migration.

Migrate Users and Roles to Oracle Analytics Server

Before you migrate to Oracle Analytics Server, you must replicate the users and groups that Oracle Analytics Cloud uses in Oracle Analytics Server. The way you do this depends on whether you're using Oracle Identity Cloud Service or an embedded WebLogic LDAP server. If you subscribe to Oracle Analytics Cloud - Classic through Universal Credits, you manage users in Oracle Identity Cloud Service. If you subscribe to Oracle Analytics Cloud - Classic through a traditional metered or unmetered subscription, you might be using an embedded WebLogic LDAP server.

Topics

- [Migrate Users and Groups from Oracle Identity Cloud Service](#)
- [Migrate Users and Groups from Embedded WebLogic LDAP Server](#)

Migrate Users and Groups from Oracle Identity Cloud Service

Use export features in Oracle Identity Cloud Service to export users and groups from Oracle Analytics Cloud. The way you migrate these users and groups to Oracle Analytics Server depends whether your target environment uses the default WebLogic

LDAP server for identity management or an alternative identity provider such as Oracle Internet Directory (OID LDAP).

The way you import users and groups depends on the identity provider you plan to use with Oracle Analytics Server.

1. In Oracle Identity Cloud Service:
 - a. Export users. See Export Users from IDCS in *Administering Oracle Identity Cloud Service*.
 - b. Export user groups. See Export Groups from IDCS in *Administering Oracle Identity Cloud Service*.

Before you import CSV files on your target environment, take some time to make sure the CSV files contain all the information required by the target identity provider.

2. Prepare both CSV files for migration.
 - a. Review the users CSV file, ensure the information is complete, and delete extinct users you don't need any more.
 - b. Repeat for the groups CSV file.
3. Replicate users and groups on the target identity provider for Oracle Analytics Server.
 - a. Import users from the CSV file you exported earlier.
 - b. Import groups from the CSV file you exported earlier.

Migrate Users and Groups from Embedded WebLogic LDAP Server

If you subscribe to Oracle Analytics Cloud - Classic through a traditional metered or unmetered subscription you might be using an embedded WebLogic LDAP server for identity management. The way you migrate users and groups to Oracle Analytics Server depends whether your target environment uses the default WebLogic LDAP server for identity management or an alternative identity provider such as Oracle Internet Directory (OID LDAP).

If your source Oracle Analytics Cloud uses an embedded WebLogic LDAP server, use the `wls_ldap_csv_exporter` script to export users and groups to CSV files that you can migrate to Oracle Analytics Server. Prepare both CSV files so they contain all the information required and then import them on the target environment.

1. Export users and groups from your source environment. Run the `wls_ldap_csv_exporter` script:

```
$ /bi/app/public/bin/wls_ldap_csv_exporter -u weblogic_admin_user -c  
oracle_common_folder_path -D output_dir
```

Typically, `oracle_common_folder_path` is the folder `/bi/app/fmw/oracle_common`

This script creates two CSV files, one CSV file contains users and the other contains groups. There is also a log file, which describes any invalid or incompatible records that your target environment won't understand.

- Every user must have a default password.
- Group memberships records are discarded from the group CSV file and mentioned in the log file; that is, where a group is a member of another group.

Before you import CSV files on your target environment, take some time to make sure the CSV files contain all the information required by the target identity provider.

2. Prepare both CSV files for migration.
 - a. Review the log file for information about invalid or incomplete records.
 - b. Review the users CSV file, ensure the information is complete, and delete extinct users you don't need any more.
 - c. Repeat for the groups CSV file.
3. Replicate users and groups on the target identity provider for Oracle Analytics Server.
 - a. Import users from the CSV file you exported earlier.
 - b. Import groups from the CSV file you exported earlier.

Connect to Your Data

The way you connect Oracle Analytics Server to your data depends where your data is stored and how you plan to use the data.

Where is Your Data Stored?	Description	More Information
On-premises database	You can keep your data in on-premises databases such as Oracle Database, Oracle Essbase, Microsoft SQL Server, Teradata, and IBM DB2.	Connect to Data on On-premises Databases
Oracle Database on Oracle Cloud Infrastructure	You can keep your data in the same database. You don't need to edit the database connection details in Oracle Analytics Server before or after migration. After migration, you might need to update access control lists, firewalls, or other security on the cloud database to enable access to Oracle Analytics Server.	Connect to Data on Oracle Cloud Infrastructure
Other cloud databases	You can keep your data in the same database. You don't need to edit the database connection details in Oracle Analytics Server before or after migration. After migration, you might need to update access control lists, firewalls, or other security on the cloud database to enable access to Oracle Analytics Server.	Connect to Data on Other Cloud Databases

Connect to Data on On-premises Databases

You can keep data in your on-premises database. If you installed Data Gateway or Remote Data Connector on the on-premises network so that Oracle Analytics Cloud could access the remote data you can remove them. Oracle Analytics Server doesn't require Data Gateway (or Remote Data Connector).

1. After migration, reconfigure the connection to the on-premises database in Oracle Analytics Server or Oracle BI Administration Tool.
2. If required, add the IP address of Oracle Analytics Server to the allowlist for the on-premises database (on your firewall).
3. Optional: Remove Data Gateway (or Remote Data Connector) from the on-premises database network.

Connect to Data on Oracle Cloud Infrastructure

If you want Oracle Analytics Server to connect to a database on Oracle Cloud Infrastructure, you must add the IP address of the new Oracle Analytics Server instance to the database's allowlist.

1. Determine the IP address of the target Oracle Analytics Server.
2. Add the IP address of your target Oracle Analytics Server to the allowlist for your database on Oracle Cloud Infrastructure.

Connect to Data on Other Cloud Databases

If you want Oracle Analytics Server to connect to any other cloud data source (non-Oracle), you might need to register its IP address with the data source to ensure that Oracle Analytics Server is identified as a trusted source.

1. Determine the IP address of the target Oracle Analytics Server.
2. If required, add the IP address of Oracle Analytics Server to the allowlists for your cloud data sources.

Include the IP Address of Oracle Analytics Server in Allowlists

If you previously included the IP address or endpoint of your Oracle Analytics Cloud instance in any allowlists, you must perform this task again for Oracle Analytics Server.

1. Determine IP address information for Oracle Analytics Server.
2. Add the IP address associated with your target Oracle Analytics Server to data source allowlists, as required.

Clean Up Your Source Environment

Oracle recommends that you clean up your Oracle Analytics Cloud environment *before* you migrate to Oracle Analytics Server as the more content you have, the more time it takes to migrate. Deleting any old or redundant catalog content and removing extinct users makes the migration smoother and faster.

1. Remove extinct users and groups from the identity store as this also reduces the size of the snapshot and speeds up migration.
2. If you configured usage tracking, review the usage tracking data to identify unused objects.
3. Delete catalog content (workbooks, analyses, dashboards, reports) that you no longer need or don't want to migrate to Oracle Analytics Server from your personal folders and shared folders.
4. Delete unused or old datasets, data flows, and sequences that you don't use.
5. Delete unused database connections that you don't need anymore.
6. Delete unused objects in your semantic model that you don't want to migrate.
7. Delete objects that Oracle Analytics Server doesn't support, such as data replications.
8. Invite other users to complete the same cleanup tasks.

3

Migrate Your Oracle Analytics Cloud Instance

When your target environment is ready, capture the information you want to migrate in a snapshot and copy it to Oracle Analytics Server.

Task	Description	More Information
Understand snapshot options	Understand what you can include or exclude when you take a snapshot.	Understand Snapshot Options
Check your target is ready for migration and take a backup	Verify that the required users and roles are available in your target service and take a snapshot in case you need to roll back.	Back Up Your Target System Before Migration
Take a snapshot of the source	Capture the content you want to migrate on the source system.	Take a Snapshot on the Source
Export content from the source	Download the snapshot that you want to migrate to your local file system.	Download the Snapshot
Edit connections and clean up the semantic model file (RPD)	Update connection strings in your semantic model file (RPD) and remove content you don't want to migrate.	Clean Up and Reconfigure Your Semantic Model File (RPD)
Import content on the target	Sign in to Oracle Analytics Server and import the snapshot.	Import the Snapshot on the Target
Restore the snapshot content	Select the newly uploaded snapshot in the list of saved snapshots and restore the content in the snapshot.	Restore the Snapshot on the Target
Reconfigure system settings	Verify various administrative settings on the target.	Configure System Settings Configure Publisher Settings
Activate deliveries	Configure an email server for Oracle Analytics Server. Disable deliveries on the source and start delivering content from the target Oracle Analytics Server.	Configure Email and Agents Restore and Enable Delivery Schedules

Understand Snapshot Options

You can set various options when you take a snapshot of the Oracle Analytics Cloud environment you want to migrate.

- [Options When You Take a Snapshot](#)
- [Options When You Restore a Snapshot](#)

Options When You Take a Snapshot

When you take a snapshot you choose the content you want to include in it. You can take a snapshot of your entire environment (everything) or specify only specific content that you want to back up or migrate (custom).

- **Everything** - Saves your entire environment in the snapshot. This option is useful if you want to:
 - Back up everything in case something goes wrong.
 - Migrate everything to a new environment.
 - Clone an existing environment.

File-based data and map files that users upload aren't included in the snapshot.

- **Custom** - You select which content to save in the snapshot. Some content types are always included while others are optional.

Snapshot Option	Description	Optional?
Data	Data visualization content that users create (Data tab).	
– Datasets	Datasets that users create for data visualizations and data flows.	Always included
– File-based Data	File-based data that users upload to create datasets. For example, data uploaded from a spreadsheet. This option captures references to your data files. Actual data files aren't included in the snapshot.	Optional
– Connections	Data connections that users create so they can visualize their data.	Always included
– Data Flows	Data flows that users create for data visualization.	Always included
– Sequences	Sequences that users create for data visualization.	Always included
– Data Replications	Data replications that users create for data visualization.	Optional
– Semantic Models and Subject Areas	Semantic models that users develop (SMML) and semantic models that users deploy (RPDs).	Always included
Machine Learning	Machine learning models that users create from data flows.	Always included
Jobs	Jobs that users schedule for data flows, sequences, data replications, and pixel-perfect reports.	Optional

Snapshot Option	Description	Optional?
Plug-ins and Extensions	Extensions that users upload to implement custom visualizations and custom maps.	Optional
Configuration and Settings	Service configuration and settings configured through Console. For example, mail settings, database connections, safe domains, data connectivity configurations, and so on. Note: System settings aren't included in the snapshot.	Optional
Day by Day	Day by Day content such as the "For You" feed, bring backs, comments, and shared cards.	Optional
Application Roles	<ul style="list-style-type: none"> – User-defined application roles that administrators create through Console. – Membership details for each application role, that is, the users, groups, and other application roles assigned to each application role. 	Always included
Credentials	<ul style="list-style-type: none"> – Data connections: Credentials and other connection parameters, such as host, port, user name, and password. If you exclude credentials, you must reconfigure the connection details after you restore the snapshot. – Cloud storage: Credentials required to access cloud storage where file-based data that users upload is stored. If you include file-based data in your snapshot, include the storage credentials if you plan to migrate the content to another environment. If you exclude credentials, you can use the Data Migration utility to download and then upload your data files separately. 	Optional

Snapshot Option	Description	Optional?
Classic Content	Content that users create in Oracle Analytics Cloud, such as workbooks, analyses, dashboards, and pixel-perfect reports.	Always included
– Catalog Content	Catalog containing content that users create and save for future use, such as workbooks, analyses, dashboards, reports, deliveries, agents, and so on.	Always included
– Shared Folders (including Workbooks)	Content that is being shared, that is, content that everyone with access to can see. This includes any workbooks saved in the shared folders.	Always included
– User Folders and Personalizations (including Workbooks)	Content stored in user folders. Content that users create and store for their private use. This includes any workbooks that users save in their private folders and any personalizations that they make to these workbooks.	Optional

Options When You Restore a Snapshot

When you restore content from a snapshot you have several options. You can restore only the content that's inside the snapshot, restore everything in your environment, or restore a specific set of items in the snapshot (custom).

- **Replace Snapshot Content Only** - Everything in the snapshot that's supported in your environment is restored. Any content type excluded from the snapshot remains unchanged in your environment.
- **Replace Everything** - Replaces your entire environment using information in the snapshot.

Any content type excluded from the snapshot is restored to its default state, that is, "no content". For example, if you chose not to include jobs in the snapshot, any jobs that exist on your system are deleted when you restore the snapshot and the jobs feature is restored with default settings. There are some exceptions; if the snapshot doesn't contain any file-based datasets, plug-ins, or extensions these items are left unchanged.

This option is useful if you want to:

- Replace everything after something went wrong.
- Migrate from another service.
- Clone an existing service.
- **Custom** - You select the content you want to restore. If you don't want to restore certain content types, exclude them before you restore. In most cases, the options on restore are the same as the options when you take a snapshot. Some content types are always restored, while others are optional.

 **Note:**

When you restore *catalog content* from a snapshot, delivery schedules aren't automatically restored or activated. This is so you can restore and activate deliveries at a time that suits you. See [Restore and Enable Delivery Schedules](#).


If your snapshot contains items that your environment doesn't support, you see the message "Not supported in this environment".

Restoring a Snapshot Taken from a Different Product

You can take snapshots in several Oracle products; Oracle BI Enterprise Edition 12c, Oracle Analytics Cloud, and Oracle Analytics Server.

- **Unsupported Content**

If you take a snapshot in one product and try to restore it in a different Oracle product, you might find the snapshot contains some items that the target environment doesn't support. When Oracle Analytics detects unsupported content, warning icons display on the Custom page to highlight unsupported items in the snapshot that won't be restored.

 Not supported in this environment

For example, you take a snapshot in Oracle Analytics Cloud and include data replications, file-based datasets, plug-ins and extensions in the snapshot. When you restore the snapshot in Oracle Analytics Server, you notice that these items are marked *not supported*. Oracle Analytics Server doesn't allow you to include data replications, file-based datasets, plug-ins and extensions in an Oracle Analytics Server snapshot or import them from snapshots you created in other products.

Back Up Your Target System Before Migration

Verify that your target Oracle Analytics Server is ready for migration and then take a snapshot in case you need to roll back the system to its pre-migration state.

1. Sign-in to the target Oracle Analytics Server.
2. Verify that the users and roles you imported are available.
 - a. Navigate to **Console**, and click **Users and Roles**.
 - b. Click the **Users, Groups, and Application Roles** tab to verify the users and their application roles.
3. Take a snapshot of the target Oracle Analytics Server.
 - a. Navigate to **Console**, and click **Snapshots**.
 - b. Click **Create Snapshot**.
 - c. For description, enter "Snapshot before content migration" or something similar.
 - d. Select **Everything**, and then click **Create**.

Export Your Content

After cleaning up your source catalog, capture the content you want to migrate in a snapshot and export it to your local file system.

1. Sign-in to the source Oracle Analytics Cloud.
2. Navigate to **Console**, click **Snapshots**, and then **Create Snapshot**.
3. For name, enter `Migrate content to Oracle Analytics Server` or something similar.
4. Select **Everything** to save the entire environment, and then click **Create**.
See also [Take a Snapshot on the Source](#).
5. Export the snapshot to your local file system. Select the option **Local File Storage**.

You're asked to create a password for the snapshot (BAR file). The password must be between 8 and 50 characters long and contain at least one numeric character, one uppercase letter, and one lowercase letter. Don't forget this password as you'll need this password when you upload the snapshot on the target system.

See [Export the Snapshot](#).

Clean Up and Reconfigure Your Semantic Model File (RPD)

You must reconfigure data source connection information and clean up your semantic model file (RPD) *before* you migrate content from Oracle Analytics Cloud to Oracle Analytics Server.

- Reconfigure connections to your data.
- Reconfigure connections to your usage tracking database (if required).
- Remove objects you no longer need or don't want to migrate to Oracle Analytics Server.
- Remove or disable objects that Oracle Analytics Server doesn't support. If you haven't done so already, read [Feature Availability and Comparison with Oracle Analytics Cloud](#).

To clean up an edit the semantic model file (RPD):

1. Download and install the Oracle Analytics Client Tools version that matches the source Oracle Analytics Cloud (January 2022, 6.4).

<https://www.oracle.com/solutions/business-analytics/oac-tools-archive-downloads.html>

For instructions, see [Download and Install Developer Client Tool for Oracle Analytics Cloud](#).

2. In Model Administration Tool, connect to Oracle Analytics Cloud. Click the **File** menu, select **Open**, then **In the Cloud**, and enter the connection information.
3. Download the latest semantic model file locally.
 - a. Click the **File** menu, then click **Save As**.
 - b. Enter a suitable name for the file. For example, `myoac_classic.rpd`.
The default password is the password you used to connect to Oracle Analytics Cloud.
 - c. Click **Yes** to run a global consistency check.
 - d. Save the file locally.

4. In Model Administration Tool, open the semantic model file that you saved locally.
5. Change the password, if required.

Make a note of the password that you set for the semantic model file (RPD).

6. Update database connection information.

If you configured Data Gateway to enable access to your on-premise database or you moved your data to a different database you need to reconfigure your database connections.

- a. Navigate to the **Physical Layer** pane, select the database connection you want to edit, and open the **Connection Pool** dialog.
- b. Edit the connection details in **Data Source Name**.

If your semantic model file includes connections to multiple databases, ensure that the settings for each connection pool are correct.

If you configured a usage tracking database for Oracle Analytics Cloud and you want to use a different database for Oracle Analytics Server, update the connection pool settings.


7. Delete unused database connections that you don't need anymore.
8. Clean up initialization block information:
 - a. Verify that initialization blocks point to the correct data source.
 - b. Disable or delete unused initialization blocks that you don't need anymore.
9. Review any semantic model or session variables.
10. Disable subject areas that you don't want to expose in Oracle Analytics Server or that won't have a working connection.

If connection information is missing, users see the message `Fetch subject areas failed error` when they view subject areas in Oracle Analytics Server.

11. Use Consistency Check Manager to run a global consistency check.
12. Save the changes to your semantic model file (RPD).


Import Your Content

In your Oracle Analytics Server environment, import and restore the snapshot file (BAR) you exported from Oracle Analytics Cloud.


1. Sign-in to the target Oracle Analytics Server.
2. Click **Console**.
3. Click **Snapshots**.
4. Import the snapshot file (BAR).
 - a. Click the **Page** menu  and select **Import Snapshot**.
 - b. Use **Select** to locate the snapshot file (BAR) that you want to upload.
 - c. Enter the snapshot password.

This is the password that you set when you exported the snapshot from Oracle Analytics Cloud.

See Import the Snapshot on the Target.

5. Restore the content.
 - a. Select the snapshot that you just uploaded.
 - b. Click **Snapshot Actions**  and select **Restore**.
 - c. For **Restore**, select **Custom** and then deselect **Data Model and Subject Areas**.
 - d. Click **Restore**.

See Restore the Snapshot on the Target.

6. Upload the semantic model file (RPD) that you modified earlier.
 - a. Click the **Page** menu  and select **Replace Data Model**.
 - b. Use **Select** to locate the semantic model file (RPD) that you want to upload.
 - c. Enter the password for the file.

This is the password you set when you downloaded and edited the semantic model file (RPD). See [Clean Up and Reconfigure Your Semantic Model File \(RPD\)](#).
 - d. Click **Replace**.

Migrate File-based Data and Custom Maps Manually

In Oracle Analytics Cloud, users upload data files to create their datasets, such as spreadsheets. Users might also upload files containing custom map layers and map backgrounds to enhance their visualizations and reports. When you migrate to Oracle Analytics Server, users must manually move their data files and custom map files as these files aren't included in the snapshot.

- Data files (for example, XLSX, XLS, CSV, TXT files)
 - Map layers
 - Map backgrounds
1. Sign-in to the source Oracle Analytics Cloud.
 2. Download the files that you want to migrate to Oracle Analytics Server.
 - a. Navigate to the dataset that you want to download, click **Actions**, and then click **Download File**.

See Download a Dataset's Source File.
 - b. Navigate to the custom map file (map layer, map background, or map image) that you want to download, click **Options**, and then click **Download**.

For example, see Download Custom Map Layers.
 3. Sign-in to the target Oracle Analytics Server.
 4. Upload the files that you want to migrate to Oracle Analytics Server.
 - a. Navigate to the **Dataset** tab and upload your data files. Enter the same **Name** and separator values that you used in Oracle Analytics Cloud.

See Create a Dataset from a File Uploaded from Your Computer.

- b. Navigate to the **Maps** tab and upload your custom map files (map layer, map backgrounds, or map images). Enter the same **Name** and property values that you used in Oracle Analytics Cloud.

For example, see Add Custom Map Layers.

Configure System Settings

In Oracle Analytics Cloud, you configure system-level settings through the Console. These system settings are migrated for you. Take some time to review various settings on the target Oracle Analytics Server and reconfigure if required.

Note:

In Oracle Analytics Cloud, you can configure a mail server through System Settings. In Oracle Analytics Server, you must use Fusion Middleware Control to configure your mail server. For instructions, see [Use Fusion Middleware Control to Configure Email Settings](#).

1. Sign-in to the target Oracle Analytics Server and navigate to **Console**.
2. Verify all the application roles that you want are available. In the Console, click **Users and Roles**, and then click **Application Roles**.
See Add Members to Application Roles.
3. Verify your custom plug-ins and extensions on the **Extensions** page.
See Manage Custom Plug-ins.
4. Verify your virus scanner configuration on the **Virus Scanner** page.
See Set Up a Virus Scanner.
5. Verify your safe domains are configured on the **Safe Domains** page.
See Register Safe Domains.
6. If you customized advanced settings in your source service, verify the settings are correct on the **System Setting** page.
See Configure System Settings using the Console.
7. Verify map configuration for data visualizations on the **Maps** page.
See Make Map Layers and Backgrounds Available to Users.
8. Verify map configuration for analyses and dashboards on the **Manage Map Data** page (Classic Administration).
See Set Up Maps for Dashboards and Analyses.

Configure Publisher Settings

In Oracle Analytics Cloud, administrators use the **Manage Publisher** option in the Classic Administration page to set up and configure pixel-perfect reporting. The Manage Publisher settings aren't migrated to Oracle Analytics Server, so you need to reconfigure these settings on your target system.

1. Sign-in to the target Oracle Analytics Server.
2. Click the **Page** menu on the Home page, and select **Open Classic Home**.
3. Click **Administration**.
4. Click **Manage Publisher**.
5. Reconfigure the various options for publishing reports. For example:
 - Set Up Data Sources
 - Set Up Delivery Destinations
 - Configure System Maintenance Properties
 - Define Runtime Configurations
 - Configure the Scheduler

Use Fusion Middleware Control to Configure Scheduler Email Settings that Affect Agents

Configuring email settings that affect agents ensures users and other notification recipients receive messages appropriately.

Before you begin this procedure, ensure that you're familiar with Fusion Middleware Control.

1. Go to the Overview page.
2. Display the Mail tab of the Configuration page as appropriate.
3. Click **Lock and Edit** to enable changes to be made.
4. Complete the following options:
 - **SMTP Server**
 - **Port**
 - **Display name of sender**

This option is used in the SMTP From field as a meaningful substitution for the sender's address.
 - **Email address of sender**

This option specifies the email address on the SMTP Server that's used as the sender's reply-to address for all mail sent from the Scheduler. The initial value is `defaultuser@defaultmailserver.com`, which you must change to reflect a valid email address. Note that if you want to indicate that email recipients needn't reply, add `no_reply@mycompany.com` or `do_not_reply@mycompany.com` to this field.
 - **Username**
 - **Password**
 - **Confirm password**
 - **Number of retries upon failure**
 - **Maximum recipients**
 - **Addressing method** To, Blind Copy Recipient (Bcc)

- **Connection Security**
 - **Specify CA certificate source**
 - **CA certificate directory**
 - **CA certificate file**
 - **SSL certificate verification depth**
 - **SSL cipher list**
5. Click **Apply**, then click **Activate Changes**.
 6. Return to the Overview page and click **Restart**.

For information about advanced configuring settings for agents, see [Configure and Manage Agents](#).

For information about corresponding configuration file elements, see [Map User Interface Labels with Configuration File Elements](#).

Restore and Enable Delivery Schedules

When you restore content from a snapshot or migrate content from a different environment, delivery schedules defined for agents, analyses, and dashboards in the snapshot aren't restored or activated right away. When you're ready to restore deliveries on your system, you can decide whether to enable or disable delivery schedules on your system. This is useful as you might not want to immediately start delivering content.

For example, if you're restoring a production environment, you probably want to restart deliveries as soon as possible. Whereas in a test environment, you might prefer to disable deliveries after restoration and activate them at a later date.

1. In the Oracle Analytics Home page, click the **Navigator**, and then click **Console**.
2. Click **Monitor Deliveries**.
3. To restore deliveries, click the **Action** menu for the page and select **Restore Deliveries**.
4. Select whether to restore and activate deliveries or restore deliveries only. Select one of the following:

- **Maintain Delivery Schedule Status**

All delivery schedules maintain their status (enabled or disabled).

- Existing delivery schedules remain unchanged.
- New delivery schedules created during the restore process inherit the schedule status that's defined in the corresponding agent, analysis or dashboard.

For example, this option is useful when you restore deliveries in a production environment where you want deliveries to be active immediately.

- **Disable Delivery Schedules for New Deliveries**

Delivery schedules that are created during the restore process for agents, analyses, and dashboards are disabled. Existing delivery schedules remain unchanged.

For example, this option is useful when you restore deliveries in a test environment where you don't need to activate deliveries immediately.

- **Disable All Delivery Schedules And Delete All History (Not recommended)**

All delivery schedules are disabled during the restore process and any delivery history is deleted.

- Existing delivery schedules are disabled.
- New delivery schedules created for agents, analyses, and dashboards during the restore process are disabled.
- Historical delivery details no longer available.

This option is not recommended. If you do select this option, you must manually enable delivery schedules for all agents, analyses, and dashboards.

5. Click **Restore**.

6. To activate a delivery, click the Action menu for the delivery, and select **Enable**.

To activate multiple deliveries at once, select **Shift** + click or **Ctrl** + click to select all the deliveries you want to activate, then right-click and select **Enable**.

If necessary, click **Edit** to redefine the delivery schedule.

4

Complete Post-Migration Tasks

After successfully migrating your Oracle Analytics Cloud content to Oracle Analytics Server, test your service thoroughly, and then perform cleanup and other optional configuration tasks.

Task	Description	More Information
Test the migrated content	Check the content you migrated is available on Oracle Analytics Server and everything works as you expect.	Verify Migrated Content
Test usage tracking	(Optional) Verify usage tracking is working in Oracle Analytics Server.	Test Usage Tracking
Resume scheduled pixel-perfect report jobs	(Optional) Disable any pixel-perfect report jobs that are currently scheduled on the source and start the scheduled report jobs on the target Oracle Analytics Server.	Restart Scheduled Jobs for Pixel-Perfect Reports
Test auditing data for pixel-perfect reports	(Optional) Verify auditing information for pixel-perfect reports is working in Oracle Analytics Server.	Test Audit Data for Pixel-Perfect Reports
Customize settings in configuration files	(Optional) Replicate any changes that you made to configuration files in Oracle Analytics Server.	Customize Settings in Configuration Files
Clean up resources on Oracle Cloud Infrastructure	Remove any resources that you don't need.	Clean Up Resources in Oracle Cloud Infrastructure

Verify Migrated Content

After migrating your Oracle Analytics Cloud instance to Oracle Analytics Server, test your system thoroughly to ensure it's production-ready.

1. If you use Data Modeler, verify your data models and their database connections.
2. Run analyses to check they display the correct data.
3. Open dashboards to check they display as expected.
4. Open pixel-perfect reports to check the output.
5. If you set up email delivery schedules for your content, verify that they're working.
6. Navigate to the **Home** page, then open workbooks and visualizations to make sure the visualizations display the correct data.
7. Navigate to the **Data** page.
 - a. Verify your datasets.
 - b. Check connection details.
 - c. Run data flows.
 - d. Execute sequences.

Test Usage Tracking

If you set up usage tracking in Oracle Analytics Cloud, the usage tracking parameters you configured on the System Settings page are migrated to Oracle Analytics Server.

1. In Oracle Analytics Server, navigate to **Console**, and then click **System Settings**.
2. Check the settings under **Usage Tracking**.

See Set Usage Tracking Parameters.

Restart Scheduled Jobs for Pixel-Perfect Reports

If users scheduled publishing jobs in Oracle Analytics Cloud, the jobs and options that administrators configured on the Scheduler Configuration page are migrated to Oracle Analytics Server. Initially, all the jobs migrated to Oracle Analytics Server are paused. When you're ready, disable the jobs on Oracle Analytics Cloud and restart them on Oracle Analytics Server.

1. In Oracle Analytics Server, navigate to the Publisher Administration page.
2. Under **System Maintenance**, navigate to **Scheduler Configuration** and check the settings.

See Configure System Maintenance Properties.

3. Navigate to the Manage Report Jobs page. On the header, click **Open**, and then click **Report Jobs**.
4. Activate your jobs on Oracle Analytics Server. Select one or more jobs, and click **Resume**.

See Resume Jobs.

Test Audit Data for Pixel-Perfect Reports

If you enabled the auditing option for pixel-perfect reports in Oracle Analytics Cloud, you must reconfigure the settings on the Server Configuration page in Oracle Analytics Server. The audit data collected in Oracle Analytics Cloud isn't migrated to Oracle Analytics Server.

1. In Oracle Analytics Server, navigate to the Publisher Administration page.
2. Check the settings under **Server Configuration**.
See [Enable or Disable Viewing of Publisher Audit Data](#).
3. Access some pixel-perfect reports or report jobs to generate some audit data.
4. Navigate to the audit report that you used in Oracle Analytics Cloud and view the audit data.

See View Publisher Audit Data.

Customize Settings in Configuration Files

(Oracle Analytics Cloud - Classic only) Configuration file customizations that you made in your Oracle Analytics Cloud - Classic environment aren't migrated to Oracle Analytics Server. After migrating to Oracle Analytics Server, you must replicate the configuration file changes in your Oracle Analytics Server environment.


For example, configuration files such as:

- `NQSConfig.ini` (Oracle BI Server)
- `instanceconfig.xml` (Oracle BI Presentation Services)
- `obijh.properties` (JavaHost)
- `config.xml` (JavaHost)
- `bridgeconfig.properties` (Presentation Services Plug-in)

For a full list of files and properties you can configure in Oracle Analytics Server, see [F Configuration File Settings](#).

Clean Up Resources in Oracle Cloud Infrastructure

After testing your Oracle Analytics Server, you can delete the source Oracle Analytics Cloud instance on Oracle Cloud Infrastructure. Remove these resources from Oracle Cloud Infrastructure to avoid costs for services that you no longer use.

1. Sign in to your Oracle Cloud account, and navigate to the **Analytics Cloud** page (under **Solutions and Platform**).
2. Select a **Compartment** from the list.
3. Click **Other Analytics** to view your services on Oracle Cloud Infrastructure (Gen 1).
4. Click **Manage Instances**.
5. Click **Manage this instance**  for the instance you migrated to Oracle Cloud Infrastructure (Gen 2), and then select **Delete**.
6. When prompted, enter your administrator credentials, and then click **Delete** again to confirm.