



Business Intelligence



Crystal Enterprise Reports Migration Strategy

California State Government Agency

COMSYS recently acquired Praeos Technologies Inc., a leading Atlanta-based provider of IT consulting services specializing in the business intelligence, data warehousing and analytics sectors.

Praeos' strong practice in business intelligence and data warehousing have become the platform for these services offerings within the COMSYS Managed Solutions Group. Together, these combined business intelligence practices, now called COMSYS BI Practice make COMSYS a leading provider in these sectors.

CLIENT SITUATION

Years before COMSYS became involved with this government client, this particular state government agency had adopted a distributed IT policy to allow their many operational units to identify and purchase the application software they thought was the best solution to address their business needs. IT was not involved in these purchases and there was not a centralized tracking of these purchases or their deployment. There was no attempt to consolidate or share usage of the same type of software solution. A recent internal audit of purchased software found that the client had production applications and more than 200 reports deployed on Crystal Reports versions 3, 4, 5, 6, 7, 8, 8.5, and 9 simultaneously. There were also two known client applications that had Crystal Reports embedded within the application. One such case was an older, heavily customized Remedy CRM application.

At the time of the audit, Business Objects had ceased support of all versions of Crystal Reports prior to version 7. The lack of vendor support had become a significant issue for the client, as evidenced by the numerous older versions of reports that had been allowed to remain in their original state for years. In addition, the current version of Crystal Enterprise version 10 did not support the administration or execution of any Crystal report developed prior to version 6, without a migration process. Near future releases of newer versions of Crystal Reports would inevitably further erode support of these previous versions.

The client's new initiatives called for migration of all related applications and reports to Crystal Enterprise 10 (CE10) and to centrally administrate them within the CE10 platform. The initiative also called for the consolidation of outlying report applications to be converted to the new CE10 platform.

COMSYS SOLUTION

After careful evaluation, the client selected COMSYS' National BI Practice. The client had already purchased CE10 from Business Objects and COMSYS was asked to provide a comprehensive maturity assessment and subsequent strategy document for the implementation of CE10 and the migration of all Crystal reports to the new enterprise platform.

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The project consisted of multiple deliverables, including:

- 1) Develop (and present) an initial BI Maturity and Readiness Assessment Findings regarding the client's multiple reporting platforms and requirements for the CE10 environment
- 2) Install and configure CE10 in both development and production environments
- 3) Develop and present a recommended best practices methodology for:
 - a. Developing reusable database connections
 - b. Use and deployment of Business Objects Business Views
 - c. Development, architecture and rollout for an enterprise data warehouse and focused data mart(s)
 - d. Management of CE10 metadata.
- 4) Provide a recommended Best Practice migration strategy to CE10 for the 200+ existing Crystal reports
- 5) Develop and present a Metadata Management Methodology strategy
- 6) Develop and present a recommended best practices document outlining the methodology, roles and processes required for the client to use and effectively manage their CE10 environment going forward.

COMSYS provided a project team that developed extensive analysis and strategy documents and cost estimates and project schedules. COMSYS also provided a part-time project manager to work closely with the client project manager to identify risks and issues and clarify project direction and scope based on COMSYS findings. The client project manager served as a focal point whenever the project team needed additional resources or information.

The client expected that there were cases where there may not be an effective migration path for some of the older reports. Some reports were identified as likely candidates. COMSYS provided the client an impact analysis and alternative recommendations if these reports could not be successfully migrated to CE10.

CLIENT BENEFITS

The project documentation deliverables were designed to be used as a strategy document to provide the client with options, considerations, known issues, recommendations, and the implications of COMSYS' recommendations for the migration of their existing Crystal reports.

- The client used the documentation to build a project plan for the successful migration of their many versions of Crystal reports. Using the COMSYS information, they were able to develop the best migration path and scope, and sequenced tasks and effort necessary to successfully migrate the numerous reports.
- Significant cost savings were realized with the elimination of license fees, administration and internal technical support costs for the various versions of the Crystal Reports platform and multiple deployments throughout the client's environment.
- A major deliverable of this project was COMSYS-led training for end-users and power users. This training and associated knowledge transfers occurred for all tools and applications that were developed and deployed.

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