

# Migrating to Brio 8

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A Brio 8 Migration Partner



# Brio 8 Migration

- The Experience of Brio 8 Migration
  - Brio 8 Migration Training for Partners in December
- Brio 8 Migration Process
  - What to expect
  - Migration Tools
  - Steps to Migrate to Brio 8
- Brio 8 Training
  - New Courses
- Brio 8 FastTrack Migration Assessment

# Brio 8 Migration Training for Partners in December

## **Select Partners to Assist Brio Software Customers in Migrating to Brio Performance Suite 8.**

SANTA CLARA, Calif., December 17, 2002 -- Brio Software, Inc. (Nasdaq: BRIO), a leading provider of next-generation business intelligence tools, today announced that it has certified a group of partners to assist customers in the migration to Brio Performance Suite 8. These partners have undergone special training from Brio Expert Services and Brio Training, providing Brio customers with a trusted source for high-quality migration services. The certification program is one of the first initiatives being extended to Brio Partners as part of the new Brio Partner Program.

"A large number of our customers have expressed their intent to migrate to Brio Performance Suite 8," said Todd Davis, EVP of Operations for Brio Software. "These partners will complement the Brio Expert Services team to ensure that our customers get the migration assistance they need in a timely manner. This is also one of the many opportunities partners have to engage with Brio in a way that helps them grow their businesses."

In November of 2002, Brio announced the new Brio Partner Program intended to deliver expanded global services to partners, including certification programs such as this one. The Partner Program was rolled out in conjunction with the Brio Performance Suite 8 launch. With Brio Performance Suite 8 ready to ship in late December, Brio has utilized the new Partner Program to certify fourteen Brio Performance Suite 8 migration partners.

**Advanced DataTools Corporation is pleased to be one of the first Brio Performance Suite 8 Migration Partners.**



# Brio 8 Products

Brio 8 Product	Rough Equivalent
Insight Server	Brio Portal and elements of the OnDemand Server and Broadcast Server
Intelligence iServer	NEW
Reports iServer	Brio Reports and Brio Portal
Knowledge Server	Knowledge Server
Designer	Designer
Explorer	Explorer
Insight (with roles)	Insight, Quickview, Freeview
SQR	Brio Reports
SQR Developer	Report Builder

# Brio Enterprise Server (OnDemand and Broadcast Server)

Have:

- Brio OnDemand and Broadcast Server

Migrate to:

- Brio Insight Server plus Brio 8 Foundation

Option:

- Brio Intelligence iServer (Thin Client)

# Brio Portal, OnDemand and Broadcast Server

Have:

- Brio Portal and Brio OnDemand and Broadcast Server

Migrate to:

- Brio Insight Server plus Brio 8 Foundation

Option:

- Brio Intelligence iServer (Thin Client)

# Brio Portal and Brio Reports (SQR)

Have:

- Brio Portal and Brio Reports (SQR)

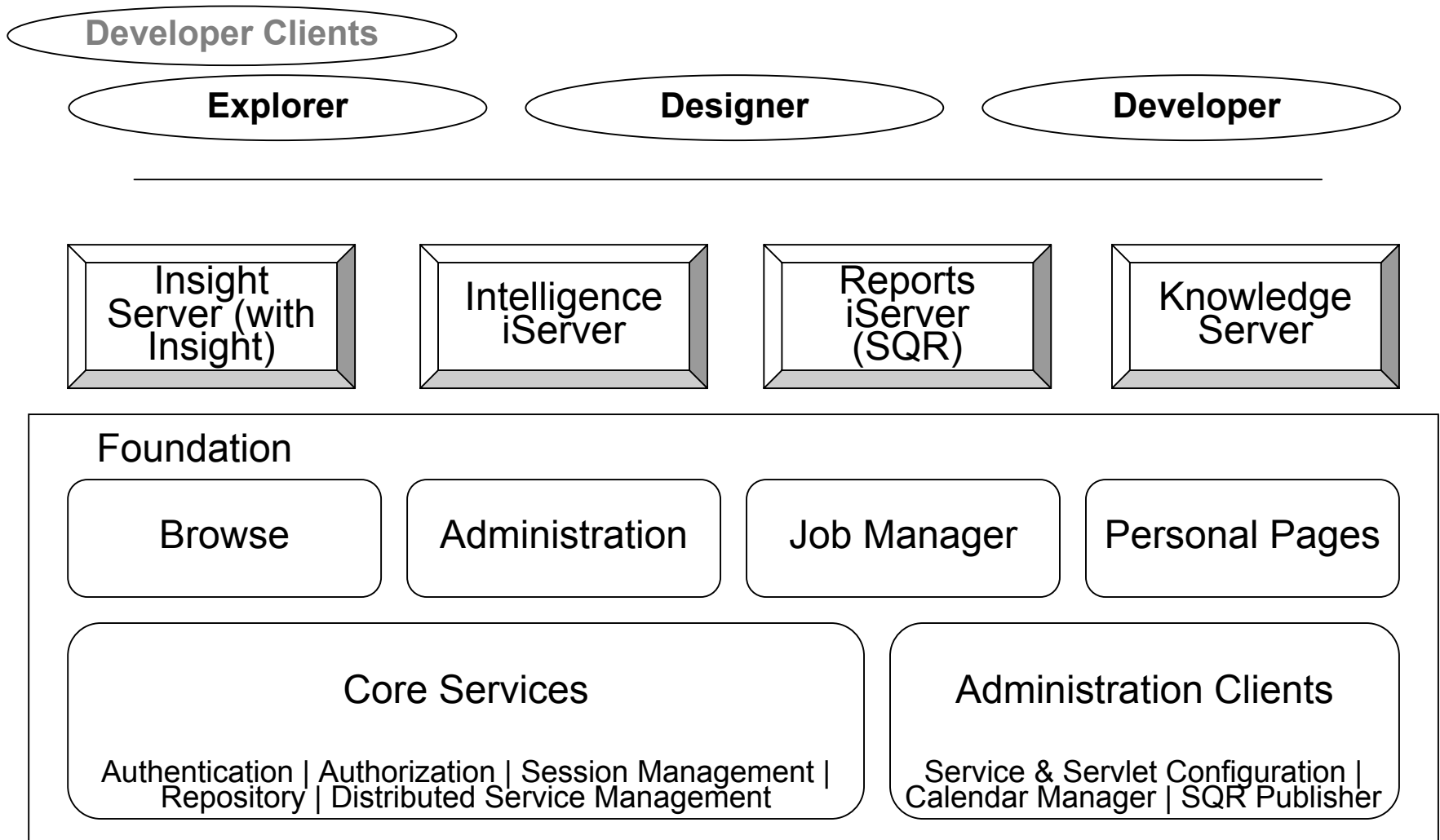
Migrate to:

- Brio Reports iServer plus Brio 8 Foundation

Option:

- Brio Intelligence iServer (Thin Client)

# Integrated Server Architecture



# Key Benefits to Brio 8

- HTML Administration of Documents
- HTML Scheduling of Documents
- HTML User Administration
- Role Driven User Access and Authorization
- Advanced HTML Presentation of Documents to User
- No changes to your BQY documents
  - (BQY version 6.2 and greater)

# New Product – Brio Intelligent iServer

- Brio thin client server (No Plug-in)
- HTML Display of BQY documents
- Can do Pivots (Swing a Pivot)
- Pre-generated HTML
- Active Document Viewing
- Some limitations – Not the same as Brio Insight

# Migration Process (Not an Upgrade)

- New Repository (over 140 tables)
- New more advanced Administration requires more complex planning
- Overwhelming abundance of new functions and features for the ODS User, need to plan this carefully
- Need to first upgrade to current supported Operating System, Database version, etc...
- Need to upgrade to Brio 6.2 or greater

# Brio 8 Migration Tools

- Migrate Portal Repository
- Migrate OnDemand Server Repository
- Migrate Broadcast Server Repository
- Migrate Knowledge Server Configuration files
- Tools will perform a pre-migration check/test
- Tools will copy Server Repository and documents to NEW Brio 8 Repository
- Migration Tools are part of Consulting Services or Separate Cost Product

# Brio 8 Migration Tools Do Not Migrate the Following...

- Server Configuration
- Job Factory Application Configuration
- WebClient Configuration
- WebClient User Interface Customization
- External Authentication (if used)
- ODS User Interfaces Customization

# Brio 8 Migration Assumptions

- Migrating from an existing supported product to a CLEAN INSTALL of Brio 8
- Not an in-place upgrade
- Extensive and time consuming process depending on your implementation
- Test, Test, Test, ...

# Brio 8 Training

- What's New in Brio 8 - February 24-25 (New)
- Reporting and Analysis with Intelligence Tools - Explorer 8.x - February 26-27 (New)
  
- What's New in Brio 8 - March 17-18 (New)
- Reporting and Analysis with Intelligence Tools - Explorer 8.x - March 19-20 (New)

# Brio FastTrack Migration Assessment

One Week for Migration Assessment and Planning

- Project Planning and Research
- Assessment Roundtables
- Analysis and Follow-up
- Presentation of Recommendations

# Brio Migration Follow-up

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