

Migrating Custom Reports from OBI to OAS

With the upcoming migration from Oracle Business Intelligence (OBI) to Oracle Analytic Server (OAS), if you have created any custom reports in your My Folder in OBI, all these reports will be lost unless you to store a copy in your institutional folder before the OBI freeze date – November 15, 2020.

All other folders, including the Summon, Summon Community, and Summon [Institution] folder, will be migrated automatically. Also, all OBI data will continue to be available in OAS.

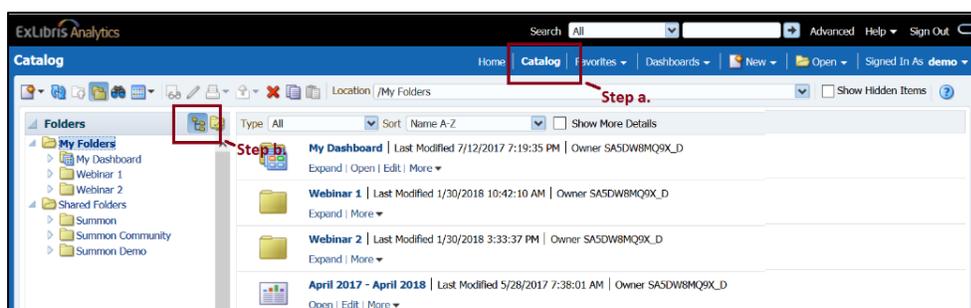
In the example below, we use the name “Demo” for the institution name; in your instance it should include your institution’s name instead of “Demo.” (Note: If you’re missing the folder, please contact support for assistance in creating one for you.)



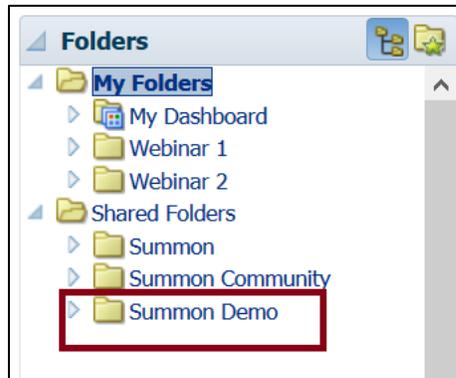
In order to ensure reports in your My Folder are also migrated, you’ll need to copy any reports you’ve created into your My Folder into your institution folder. In the example above, there are two folders with custom reports, named “Webinar 1” and “Webinar 2”. If these folders and their contents are not copied over prior to November 15, they will be lost.

Steps for Copying Your Folders or Reports to Your Institution’s Folder

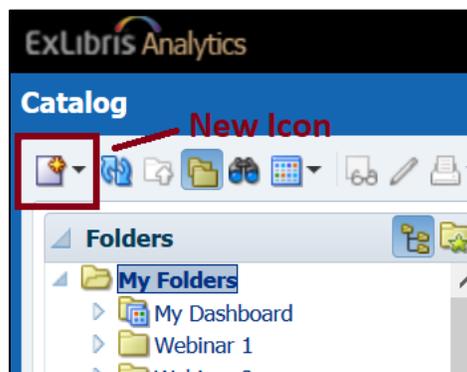
1. Within OBI, make sure you are in the Catalog section of the user interface and you have the left-hand pane set to the folder tree view. If you’ve previously used OBI, you will likely start off with this view. If not:
 - a. Click on Catalog in the upper right-hand corner of the screen. This should take you to your folders.
 - b. In the Folders pane, it should default to a folder tree. If not, click on the Folder Tree Icon in the top right corner of that pane.



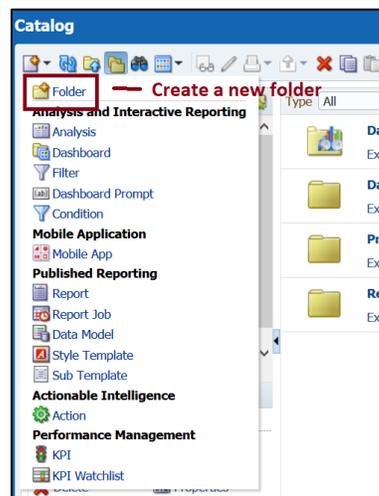
2. Next create a folder in your institution's folder to store these reports. To do this, first select your institution's folder, in this example named "Summon Demo."



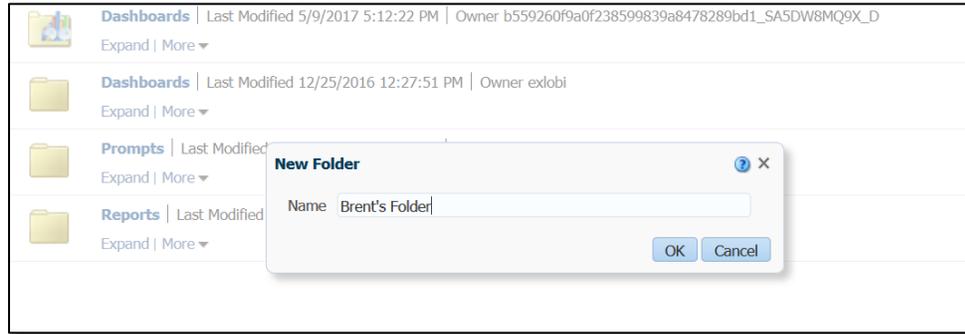
- a. Just above the Folders pane there is a New icon.



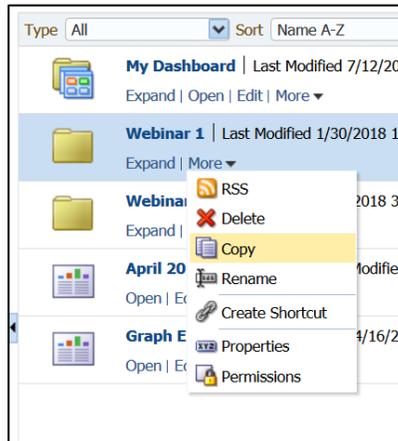
- b. Click on this to display a dropdown menu of options. The top option is Folder. Click this to create a new folder in your institution folder.



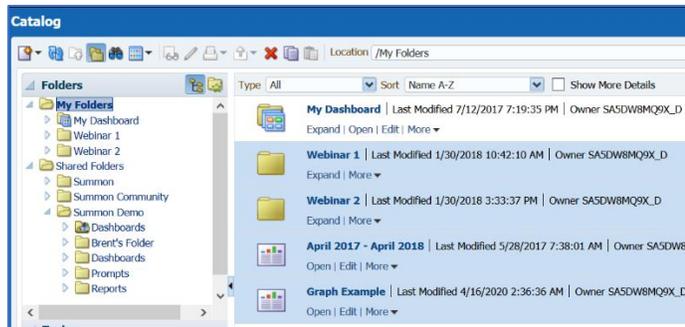
- c. Type in whatever name you'd like and click OK.



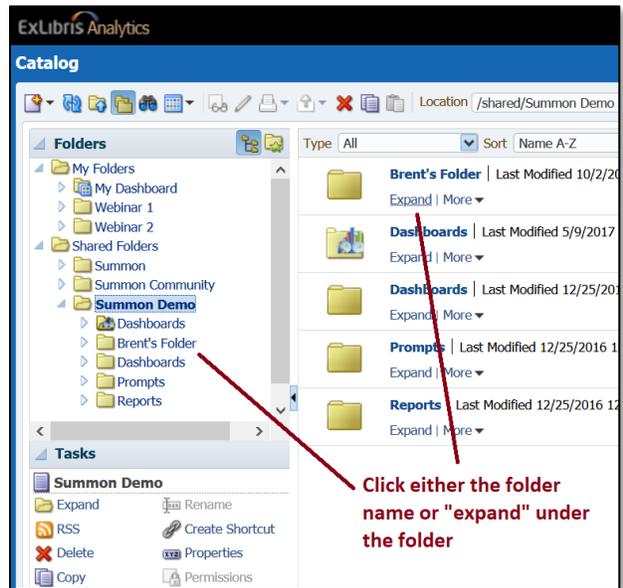
- 3. Next we want to copy the folder or report you want to migrate.
 - a. Select My Folder. In this example, we'll use the "Webinar 1" folder to demonstrate how to copy an entire folder or a single report.
 - b. Click the More link under the folder or report you wish to copy. This will display a drop-down menu with various options:



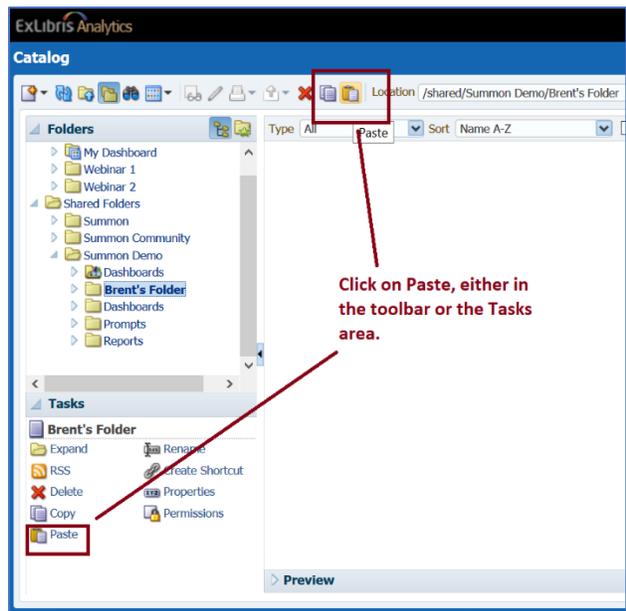
- c. Select Copy
- d. Alternatively, if you want to copy multiple folders or reports, select the first item you'd like to copy (the Webinar 1 folder in the example below), hold down the Shift key, and click on the last item in the list of items you want to copy (the Graph Example report in the example below)



- e. Then click on the Copy icon in either the toolbar or the Tasks pane.
4. Now it's time to paste your folder or report into your new folder.
 - a. Select your new folder by either clicking on the folder name in your folder tree or clicking "expand" under the folder name in the right-hand pane.



- b. Then select Paste from either the toolbar above the folder tree or using the Paste link in the Tasks pane below the folder tree.



If for some reason the Paste icon is either grayed out in the toolbar or missing from the Tasks folders, you need to repeat the Copy step under Step 3

5. Repeat this process for any additional individual reports or folders in your My Folder you'd like to ensure are migrated to the new OAS platform. All reports and folders created in your institution's folder will be visible only to individuals within your institution.

Remember: the freeze date for OBI is November 15. You need to complete this process prior to November 15. Any changes made between November 15 and November 22 will be lost and not be recoverable.

Once the migration is completed, if you'd like to move these reports and folders back to your My Folder, simply repeat the steps above. Delete the copies in your institution folder once you have completed copying them to your My Folder location.