

# Redwood Business Solutions

Making web-based report distribution a reality.

## Report2Web Version 4 Migration Services

Redwood Software offers Report2Web Version 4 Migration Services tailored for our customer's specific environment and requirements. The objective is to migrate your report data to Report2Web V4, to support the validation of publishing processes in your new environment, and to provide training for your primary administrators and users.

### Planning for Your Migration

This document is a guideline for the migration process. Migrating from previous versions of Report2Web to the new, Java-based platform of Version 4 is a process that requires dedicated resources from the customer and from Redwood Software consultants to ensure a successful project. Your specific migration plan will be highly dependent on your environment and may take from 12 to 20 days or more. On average, Redwood asks customers to budget for 15 days of professional consulting services to be divided between on-site and remote work.

To ensure the most accurate migration estimate, your assigned Redwood consultants will review your environment, develop a statement of work describing the migration plan, and validate the plan with you prior to beginning the migration project.

### Typical Migration Timeline

#### Phase 1: Pre-Installation Health Check (On site)

##### Duration: 3 days

Prior to beginning any migration from a previous version of Report2Web to V4, and to ensure that a Report2Web environment is running optimally, Redwood strongly recommends that customers periodically invest in a detailed Health Check service to clean up configurations, identify areas that could be fine-tuned for overall system performance enhancement, and to lower administrative overhead.



Your Redwood consultant will assist with the cleanup of any open issues related to your current setup, consolidating redundant report profiles (in some cases, cutting the number of required profiles by more than half), and optimizing system settings prior to beginning a migration. Performing these tasks before migration will familiarize your staff with some of the concepts of Report2Web V4, identify any potential migration issues, and could significantly reduce the amount of data that needs to go through each migration step, resulting in a faster migration process.

#### Phase 2: Initial V4 Installation and Setup (On site)

##### Duration: 4 - 5 days

Phase 2 of the migration process involves the initial setup of the Report2Web V4 server software, client tools, and related utilities in the your targeted environment (test, Virtual Machine or new production environment). Following successful installation of all software components, the Report2Web V4 training environment will be set up to give all students a hands-on learning experience. Your Redwood consultant will conduct a comprehensive training class for up to 10 students that

covers what is new and different in V4 from the end-user's and the administrator's perspectives.

#### Phase 3: Initial V4 Installation and Setup of Production Environment (On site)

##### Duration: 3 days

Phase 3 of the migration process is an optional step (required only if the targeted environment in Phase 2 was not the intended production server). Most customers elect first to test the migration process in a non-production environment, however, if resource or licensing constraints prevent this, the migration process will be 3 days shorter in duration.

#### Phase 4: Configuration of Migration Utilities (Remote)

##### Duration: 2 days

Phase 4 of the migration process is typically done remotely through a series of Web sessions. Your Redwood consultant will install a set of migration tools, configure the required scripts needed to run them based on your specific environment, and run preliminary tests to identify any potential issues that may be encountered during the migration process.



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Report2Web Welcome, David Barton (default)

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FIRST MEDICAL DIVISION (R/W DEMO REPORT)  
ACTUAL TO BUDGET COMPARISON  
INCOME STATEMENTS  
FOR THE MONTH AND YEAR TO DATE OF JULY 1, 2006  
EXPRESSED IN WHOLE DOLLARS

	CURRENT MONTH			YEAR-TO-DATE		
	ACTUAL	BUDGET	PRIOR YEAR	ACTUAL	BUDGET	PRIOR YEAR
OPERATING REVENUES						
OUTPATIENT	70,149		67,024	492,094	584,060	504,362
INPATIENT	36,442		26,995	237,260	303,471	273,010
MANAGED CARE - CAPITATION	21,854		20,726	165,236	174,839	187,766
MANAGEMENT FEES						
GROSS REVENUES	128,445		114,745	894,590	1,062,370	965,138
DEDUCTIONS FROM REVENUE	(52,035)		(35,872)	(339,367)	(427,961)	(345,681)
NET REVENUE	76,410		78,873	555,223	634,409	619,457
OPERATING EXPENSES						
SALARIES	13,616		17,420	104,402	106,085	102,925
BENEFITS	2,688		3,719	23,955	21,409	31,963
MEDICAL DIRECTORS FEES	27,987		40,740	151,291	223,896	227,576
PURCHASED PERSONNEL	525		681	2,707	4,200	3,972
PURCHASED SERVICES	7,226		7,925	56,239	58,305	60,404
MARKETING	417		36	403	3,336	434
MEDICAL SUPPLIES	3,889		7,931	25,779	32,130	30,969
NON-MEDICAL SUPPLIES	717		1,438	7,155	5,762	6,170
UTILITIES	276		296	1,640	2,208	1,974

## Phase 5: Migration of a Single Catalog and Associated Profiles (On site and Remote)

**Duration: 4 to 5 days**

During Phase 5, your Redwood consultant will perform the initial migration process on a single catalog; typically in a test environment. Following the actual data migration, your Redwood consultant will work with you to perform a series of validation steps that compare old photons to their equivalent publishing profiles, test converted Burst profiles, and ensure that all Router rules are working properly.

## Phase 6: Remaining Validation Testing and Production Migration Preparation (Customer-conducted)

Phase 6 is typically conducted by the customer, but additional Redwood consulting services can be coordinated as needed. During this time, any remaining validation testing for Burst profiles and publishing profiles is performed, and customers are asked to ensure that the production environment is ready for final data migration.

## Phase 7: Migration of Single Catalog Data to Production Environment (Remote)

**Duration: 2 days**

Using a series of remote Web sessions, your Redwood consultant will migrate the data for a single catalog to the production environment. Following the data migration, parallel processing on the old and new server environments is recommended while final validation of security and newly published data is completed. If desired, your Redwood consultant will also begin training targeted users on the new Report2Web V4 interface.

## Phase 8: Migration of Remaining Catalogs (Remote)

**Duration: Estimated 2 days per catalog**

If your Report2Web environment has multiple catalogs, an average of 2 additional days per catalog is needed to migrate data and perform the necessary validation steps.

## Get Started Today

If you are ready to begin your migration planning and step up to the most advanced enterprise report management technology available with Report2Web Version 4, contact your sales representative, visit the Redwood Software Consulting website, or Request More Information on Redwood Consulting Services.