

Pre-migration Checklist

Introduction

This checklist provides a framework for a successful reporting system migration and is designed to capture the high-level activities required to ensure a seamless transition to the Jaspersoft commercial edition.

By maintaining the integrity of your existing reports while also taking full advantage of Jaspersoft's robust features, companies often see improved performance and scalability, leading to greater productivity and organizational efficiency.

01 Examine

Survey your current systems	<input type="checkbox"/> Inventory all existing reports, their purpose, frequency of use, and users
	<input type="checkbox"/> Identify all data sources feeding the reports including their locations, access methods, and any external APIs
	<input type="checkbox"/> Map out the data flow and any dependencies between reports, data sources, and other systems
	<input type="checkbox"/> Establish a performance baseline for key reports (e.g., execution time, resource utilization) for comparison after migration
	<input type="checkbox"/> Review current security measures and access controls
Explore the target system	<input type="checkbox"/> Confirm that the target system supports all required report formats, data sources, and functionalities
	<input type="checkbox"/> Ensure the target system can handle the current reporting volume and complexity along with the ability to scale for future growth
	<input type="checkbox"/> Evaluate the security features of the target system and plan for any necessary enhancements

Best Practice — Report Consolidation

Tell a story with your data, decide what information will provide value to your clients and automate the process when possible

02 Plan and Prepare

Create a data migration plan	<input type="checkbox"/> Consider the scope of data to be migrated (historical data vs. current data)
	<input type="checkbox"/> Identify any required data transformation rules if necessary (e.g., data cleaning, format conversion)
	<input type="checkbox"/> Plan out how you will extract the data and your migration method (e.g., bulk transfer, incremental updates)
Review access control	<input type="checkbox"/> Replicate user roles and permissions in the target system
	<input type="checkbox"/> Ensure data access policies are enforced in the new environment and implement appropriate authentication and authorization mechanisms
Validate the data	<input type="checkbox"/> Develop a plan to load data into the new system and validate data integrity after migration
	<input type="checkbox"/> Define acceptance criteria for data accuracy and completeness

03 Resource and Skill Assessment

Build a project team	<ul style="list-style-type: none">Identify required roles (e.g., database administrators, report developers, testers) and clearly define their responsibilitiesAllocate required resources (e.g., budget, hardware, software) to support the migration process
Train users	<ul style="list-style-type: none">Assess the team's skills and identify any training needs related to the target systemRequest enablement sessions and leverage Jaspersoft's community, documentation, and support resources to assist during the transition
Plan for contingency	<ul style="list-style-type: none">Identify potential risks and develop mitigation strategiesEstablish a rollback plan in case of unforeseen issues
Best Practice — Train on the Job Involve experienced developers or consultants who are familiar with both tools to help with the conversion process	

04 Testing and Validation

Test plan development	<ul style="list-style-type: none">Create a comprehensive test plan covering all aspects of the migrated reporting systemInclude functional testing, performance testing, security testing, and user acceptance testing
Setup a test environment	<ul style="list-style-type: none">Develop a dedicated test environment that mirrors the production environment and populate the test environment with representative dataExecute the test plan and document any issues or discrepancies to implement necessary fixes or adjustments
Monitor performance	<ul style="list-style-type: none">Track the stability and compare performance metrics with the established baselineCollect feedback and fine-tune the system as needed to optimize performance

If you have questions about a potential migration from your current reporting platform to Jaspersoft, please [contact us](#) for a free consultation.



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