

# Session 2: SaaS Planning Workshop

## *Customizations & Integrations*

Blackboard®

November 2018



# Today

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- Information Gathering
- System Preparation Items
- General Integrations & Building Blocks
- SIS, Grades and Authentication
- Other Stuff!
- Information Gathering

# Information Gathering Workbook

## Information Gathering

## Migration Planning Checklist

## Main System Report

## Building Blocks

## Other Integrations

### Monument University: Information Gathering

*This section will be used to capture and record key information as you plan your Path to SaaS*

Question	Answer
<b>Institution/Contact Information</b> Client Institution Name Client Contact Person	<i>Name</i> Monument University  <i>Phone</i>  <i>Email</i>
Is your institution part of Internet2? (applicable for US customers only)	
Do you have any special requirements around hosting/data locations? if yes, please provide details:	
<b>Key Migration Aims</b> Do you plan to migrate Learn Production data to Learn SaaS? <i>if you answered no, leave the remaining questions in this section blank</i>	
Target go-live date for the Learn Hosting/SaaS environment:	

# What should you be looking for?

- Release version
- Legacy Content
- Snapshot Integration (not SIS Framework)
- Custom, Legacy Authentication, or Shibboleth (not SAML)
- SOAP Web Services
- Custom and uncommon 3rd Party Building Blocks
- Interaction with the "back-end"
  - Updating values in the Blackboard database directly
  - Custom command-line tools/scripts/java libraries

## Prepare for Migration – Release version

If you are not currently on a supported version of Learn, you will need to upgrade prior to the migration. Alternatively, you could consider a [course-based migration](#).

Supported versions are listed as *Full Support* in the Support Classifications section of the [Blackboard Learn Support Services Guide](#).

- Q2 2017 = January 2019
- Q4 2017 = June 2019
- Q2 2018 = January 2020

# Prepare for Migration – Legacy Content

- Prior to migrating to Blackboard Learn SaaS, all legacy course file content needs to be migrated to our embedded Xythos file system. The CourseContentMove tool has been enhanced to convert legacy course content for all courses on the entire system.
- See KB article [Move Legacy Content to Content System \(Self-hosted Windows/Linux\)](#) on Behind the Blackboard for instructions and the migration tools package used to run this step.
- If you are a Managed Hosting customer, you can submit a ticket to Support to request that the Move Legacy Content Tool be run in preparation for your move to Blackboard Learn SaaS.

# Will Our Other Integrations Work with SaaS?

Integration type	Learn 9.1 / Self & Managed Hosting	Learn SaaS Original experience	Learn SaaS Ultra experience
Building Blocks	Yes	Yes*	Yes**
SOAP Web Services +	Yes	Yes	No
IMS LTI	Yes	Yes	Yes
Partner Cloud	Yes	Yes	Yes
REST API	Yes	Yes	Yes

# Prepare for Migration – Building Blocks

For migration, all building blocks must be upgraded SaaS supported version.

- Understand your building block usage and decide which building blocks you will be migrating.
- Ensure you have acquired the installation .war file for all building blocks you plan to use, ready to install when migration planning begins.
- For 3rd party building blocks, contact the building block vendor for information/assistance on migration options where applicable.

# Prepare for Migration – Building Blocks

- Supported by Blackboard (core, add-on, ICM)
- Supported by Partner or 3rd Party
- Supported by your developer(s)

- Known to work
- Expected to work
- Known issues
- Known incompatible, defunct or not applicable
- Unknown

## After Migration – Building Blocks

- Building Blocks can only be installed by Blackboard Support
  - Provide .war installer package via support request
- Software Updates module has been removed.
  - The Building Blocks delivered with Learn are updated as necessary with the platform upgrades
  - You do not need to keep track of Bb B2s versions
- You are still responsible for keeping track of 3rd party B2 versions and requesting updates via support requests

# "Preparing Your Building Blocks For Learn SaaS and Newer Learn Versions"

- Guidance and engagement on Community
- No non-public API
- Database naming and PostgreSQL
- Shared content folder
- Logging
- Java and Tomcat version dependencies
- Ultra-experience deployments
- REST-based alternatives

# The other stuff...

- SIS -> Learn Integrations
- Learn -> SIS Grade Integrations
- Authentication
- Non GUI access

# SIS -> Learn Data Integrations in SaaS

Integration type	Learn 9.1 / Self & Managed Hosting	Learn SaaS Original experience	Learn SaaS Ultra experience
CLI Snapshot	No (since Q2 2017)	No	No
SIS Framework	Yes	Yes	Yes
<i>ILP (Colleague &amp; Banner)</i>	Yes	Yes	Work in Progress
<i>SAIP (PeopleSoft)</i>	Yes	Yes	Yes
<i>BleL (Banner)</i>	Yes	Yes	Yes

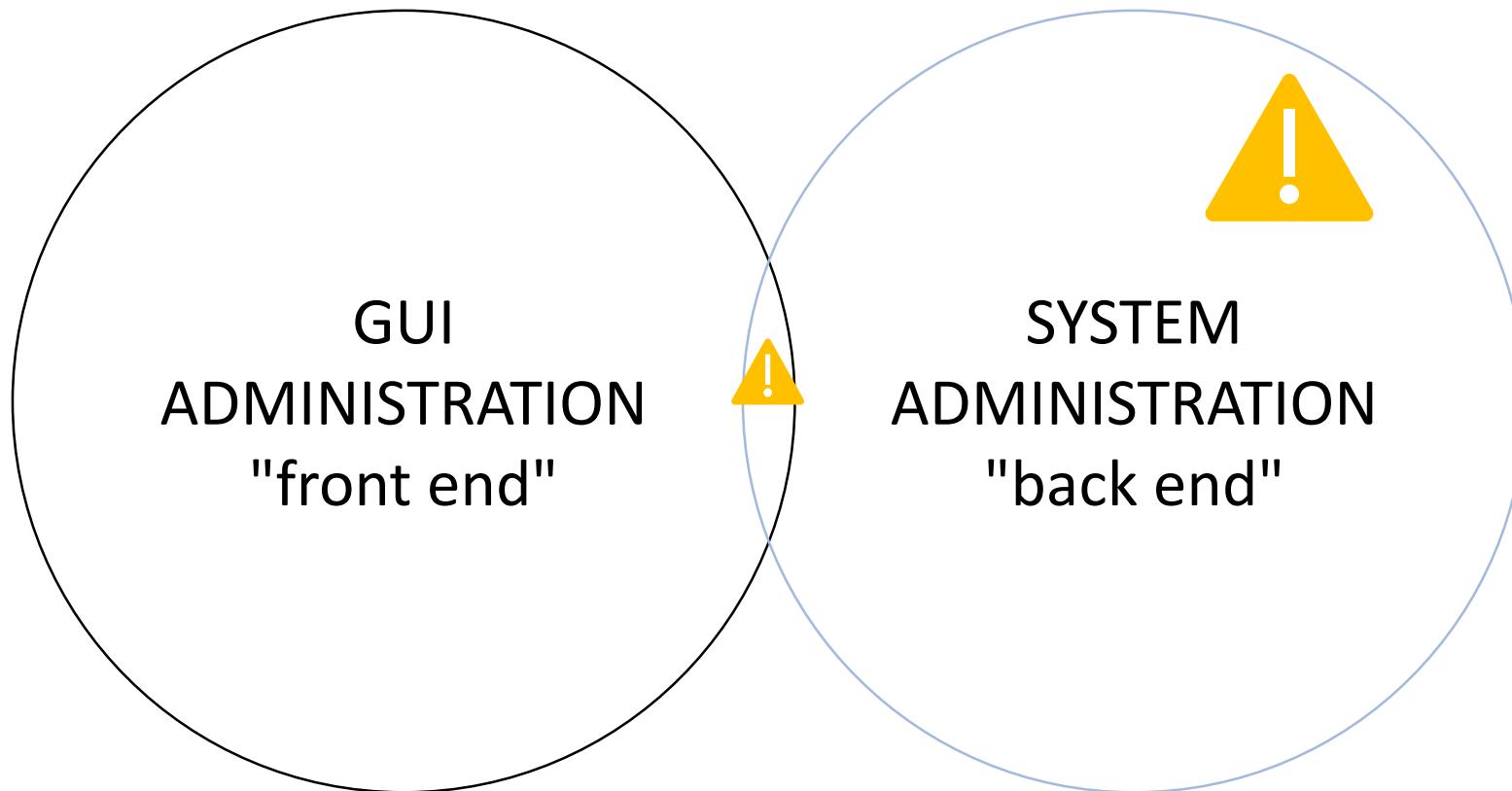
# Grades -> SIS Integrations in SaaS

Integration type	Learn 9.1 / Self & Managed Hosting	Learn SaaS Original experience	Learn SaaS Ultra experience
<b>Grades Journey</b>	Yes	Yes	Work in Progress
<b>SOAP Web Services +</b>	Yes	Yes	No
<b>REST API</b>	Yes	Yes	Yes
<b>ILP (Colleague &amp; Banner)</b>	Yes	Yes	Work in Progress
<b>SAIP (PeopleSoft)</b>	Yes	Yes	Yes

# Authentication Integrations in SaaS

Integration type	Learn 9.1 / Self & Managed Hosting	Learn SaaS Original experience	Learn SaaS Ultra experience
Default	Yes	Yes	Yes
LDAP	Yes	Yes*	Yes*
Shibboleth	Yes	No	No
SAML	Yes	Yes	Yes
CAS	Yes	Yes	Yes
Legacy	Yes	Document/Test	Document/Test
<b>AutoSignOn v2</b>	Yes	Yes	Yes

## Other Stuff?



# Command Line Access

Document EVERYTHING you can think of

- Interactions directly with the database
  - Reading vs. **Writing**
- Interactions with the file system
  - Batch archives handled by support
- Local network interactions
- Special Security Requirements
  - SSL certificates

# What Is Direct Data Access and How Does It Relate to OpenDB?



- DDA uses a read replica (exact copy) of the Production database
- Read replicas are updated usually within minutes of production
- DDA uses the OpenDB schema
- Queries and reports developed for OpenDB will generally work with DDA
- Accessed securely via SSL and IP-restricted addresses

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## If you plan to enable Ultra

If you are planning to enable Ultra, you should also document requirements for

- Multiple Hostnames
- Multiple Brands
- Institution Roles, Tabs and Modules

# Information Gathering



# Information Gathering Building Block

After installation of the B2, access the reports from the Administrator Panel

- Select *Learn Migration Information Gathering* in the Tools menu on SA Tab.
- Download the 2 files under “Main Report – CSV Download”
- Copy and paste the output into the corresponding tabs in the Information Gathering Workbook:
  - Building Blocks
  - Main System Report

**Learn Migration Information Gathering**  
This tool will gather statistical data about your Blackboard Learn environment for use by you and Blackboard as a baseline for scoping and planning a potential Hosted Hosting or SaaS. There are also other reports and data extracts that may be requested during your migration. You will have an opportunity to review and the report. No data is automatically sent to Blackboard.

Additional information about this tool, and the supporting files, can be found in [Blackboard Help](#).

**Note:** during information gathering, you will typically only be asked for reports 1 and 2. You do not need to send the other reports unless requested.

**1. Main Report - View online**  
Use this report to view (within Learn) basic information about their system and building blocks, to go along with information gathering.

This report can be run at any time as it checks basic system settings and is not resource-intensive.

**2. Main Report - CSV download**  
Download the main report as two CSV files using the links below, for import into the Information Gathering workbook or for B2 comparison. These contain basic system information and details of Building Blocks status.  
a. [Main System Report](#)  
b. [Building Blocks](#)

This report can be run at any time as it checks basic system settings and is not resource-intensive.

**4. Unique Logins Report**  
This report lists unique logins on the system during the past 7 days on the Activity Accumulator.

**Note:** The run time for this report is dependent on the volume of system and system resources available. To reduce run time on the Activity Accumulator, run it directly on the database.

**5. Building Block Usage Report**  
This report lists all installed Building Blocks. It includes an export on the number of hits recorded in Activity Accumulator.

**Note:** The run time for this report is dependent on the volume of system and system resources available. To reduce run time on the Activity Accumulator, run it directly on the database.

**Monument University: Main System Report**  
Paste all rows/columns from the [Main System Report](#), downloaded from the Information gathering B2, below. Review the output and add comments as needed.  
See Blackboard Help for more information: [Bb Help](#)

Report Output	Comments
<Paste CSV from here; match destination formatting>	

**Monument University: Building Blocks**  
Paste all rows/columns from the [Building Blocks List \(b2list\)](#) downloaded from Information gathering B2 into the columns with the same headers as the table below to install new Building Blocks, please also add them here.  
See Blackboard Help for more information: [Bb Help](#)

Name	Version	Vendor Name	Vendor ID	Handle
<Paste CSV from here>				

# Information Gathering Workbook

*Enable/allow macros when working with the Information Gathering Workbook for best results.*

Complete the sheets:

- Fill out the Information Gathering Tab
- Open and paste the CSV file contents into the corresponding tabs and complete the evaluation commentary.
- Fill out the Other Integration Tab
- Review the Migration Planning Checklist
- Send everything back to [customersuccess@blackboard.com](mailto:customersuccess@blackboard.com)

Monument University: Information Gathering	
<i>This section will be used to capture and record key information as you plan your Path to SaaS</i>	
Question	Answer
<i>Institution/Contact Information</i>	
Client Institution Name	Monument University
Client Contact Person	
	Name
	Phone
	Email
Is your institution part of Internet2? (applicable for US customers only)	
Do you have any special requirements around hosting/data locations?	
if yes, please provide details:	
<i>Key Migration Aims</i>	
Do you plan to migrate Learn Production data to Learn SaaS?	
<i>If you answered no, leave the remaining questions in this section blank</i>	

Monument University: SaaS Migration Planning Checklist	
<i>This section records key tasks and milestones throughout your Path to SaaS. Each is a collaboration between Blackboard and Monument University</i>	
Days to Go-Live	Phases / Items
-180 Days	<i>Information Gathering and Planning</i>
	Document implementation plans on the <a href="#">Information Gathering</a> sheet
	<a href="#">Go to Sheet</a>
	Install Information Gathering B2 to obtain system and Building Block reports
	<a href="#">Bb Help</a>
	Review Building Blocks and document plans on the <a href="#">Building Blocks</a> sheet
	<a href="#">Go to Sheet</a>
	Review other integrations and customizations and document on the <a href="#">Other Integrations</a> sheet
	<a href="#">Go to Sheet</a>
	Send completed workbook to <a href="mailto:customersuccess@blackboard.com">customersuccess@blackboard.com</a>
	<a href="#">Email</a>
	Review workbook and SaaS migration plans with Bb Account Team
-160 Days	<i>Other Pre-implementation Considerations</i>
	Prepare to update/replace obsolete Building Blocks and integrations
	<a href="#">Bb Help</a>
	Prepare for other configuration changes as identified during information gathering
	<a href="#">Bb Help</a>
	Schedule upgrade to Fully Supported Release, if applicable (enter target date)
	<a href="#">Bb Help</a>
	Move Legacy Content to Content System (enter target date)
	<a href="#">Bb Help</a>
	Course Cleanup (Archive and delete old courses/content), if applicable (enter target date)
	<a href="#">Bb Help</a>

## Next Steps

**Join Thursday's Session:**

David Soliday – Ohio Wesleyan University

Migration from Managed Hosting to SaaS

**Questions:**

Email: [CustomerSuccess@Blackboard.com](mailto:CustomerSuccess@Blackboard.com)

# Questions?

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