



## Everything You Need to do Before Migrating OnBase to the Hyland Cloud

Identifying key components of your on-prem solution now is vital to ensuring a successful cloud migration. Here are the most critical items to identify and know before you begin the Cloud migration process

### Master Checklist

- ☐ Upgrade Your Version of OnBase
- ☐ Convert Database to SQL Database
- ☐ Identify Your Database & Disk Group Size
- ☐ Identify Your Customer Security Administrator(s)
- ☐ Document All of Your Software Integrations
- ☐ Prepare External Autofills
- ☐ Identify & Document Your Custom Code
- ☐ Copy Scan Formats to Re-Configure After Migration
- ☐ Identify Client Specific Switches
- ☐ Identify Your Current Authentication
- ☐ Move to Hyland's Simplified Subscription Licensing Model
- ☐ Prepare Processing Files
- ☐ API Calls



# Hyland Cloud-Ready Checklist

## ☐ Upgrade Your Version of OnBase

### Notes

When you move to the Hyland Cloud, your cloud environment will be built on the newest version of OnBase. If your current on-prem OnBase solution is older than 3 years, you will be upgraded on-prem first before migrating to the Hyland Cloud. This upgrade requirement helps Naviant ensure you'll have the highest quality of support possible. Additionally, upgrading before migration makes troubleshooting far simpler than upgrading and migrating simultaneously. It also increases your chances of both - upgrade and migration - going smoothly.

### How To Upgrade Your Version of OnBase

1. The Naviant team will determine whether you need to upgrade. If you do, your Customer Success Advisor (CSA) will let you know if an upgrade is needed. They will then initiate the conversation of your upgrade and submit an upgrade request.
2. If you are under SLA, your upgrade request will be sent over to the Naviant Upgrade Team to start the upgrade on your behalf.
3. You can choose to perform the upgrade yourself. If you select this option, you can still engage Naviant for support along the way if needed.

*Note: Can't fathom doing an upgrade on your own? Naviant has a team of experts to help you. Ask your Account Manager about our flexible Managed Services offerings and how they can meet your needs.*

## ☐ Convert Database to SQL Database

### Notes

When you move to the Hyland Cloud, your cloud environment will be built on the newest version of OnBase. If your current on-prem OnBase solution is older than 3 years, you will be upgraded on-prem first before migrating to the Hyland Cloud. This upgrade requirement helps Naviant ensure you'll have the highest quality of support possible. Additionally, upgrading before migration makes troubleshooting far simpler than upgrading and migrating simultaneously. It also increases your chances of both - upgrade and migration - going smoothly.



# Hyland Cloud-Ready Checklist

## ☐ Identify Your Database & Disk Group Size

Notes

### More than 1 TB Database and Disk Group Size

Hyland will send you a S3 Bucket Credentials to upload your database and disk groups. Here is a link to the [S3 Bucket user guide](#).

### Less than 1 TB Database and Disk Group Size

You will be requested to send the database and disk groups to Hyland via a Back File SFTP. The Back File SFTP will be used to transfer files from your environment to the cloud environment when initially transferring files during the initial migration process or throughout the business process going forward. You can use any SFTP File Transfer application, but the WinSCP Application is the most popular option. Hyland will provide you with the connection information needed.

## ☐ Identify Your Customer Security Administrator(s)

Notes

Appoint a Customer Security Administrator (CSA) or identify your OnBase Administrator. Hyland often requires CSA Approval for changes or requests. By default, if Naviant is helping you with the migration, we will be your CSA. But you are also required to identify a CSA on your end. Typically, this is your OnBase administrator(s). Hyland must be notified of this contact(s) before you begin the migration process to ensure your administrators have access to the Administrator Cloud Portal and Citrix.

Name:

Contact Information:

Email:

Work Phone Number:

Cell Phone:



# Hyland Cloud-Ready Checklist

## ☐ Document All of Your Software Integrations

### Notes

Identify any applications that integrate with OnBase. Documenting these integrations before migration allows Naviant or Hyland to prepare any necessary measures early on. This will pave the way for a smooth transition to the cloud.

*Note: Integrations to other Hyland Products may require to stay on prem. These include but are not limited to Brainware and AnyDoc. Integrations to Non-Hyland Products are possible to connect over internet. Please list those integrations here..*

Complete List of Your Software Integrations

## ☐ Prepare External Autofills

### Notes

External Autofills with an External SQL Query directly to a database are not supported because if you're using an external autofill to look out at a database to retrieve data back the connection will be severed regardless of the database. You can provide this data via one of these delivery methods:

- + Flat Files
- + API Calls (Rest, Unity)
- + Web Service Calls



# Hyland Cloud-Ready Checklist

## ☐ Identify & Document Your Custom Code

### Notes

When we say custom codes, we are not talking about Unity Scripts or HTML forms. Rather, the custom codes uniquely generated to perform processing.

You must send any custom codes to Hyland during the Cloud Readiness stage. When Hyland receives them, they will review them for vulnerabilities before implementing them into your cloud environment. This is a vital step because it'll ensure there aren't any breaking points or problems that could expose your servers during the migration process.

*Note: It's safe to hand your code over to Hyland. They are not keeping it or copying it; they simply want to review it for vulnerabilities.*

The custom code review process can take between 6-8 weeks, which is why the codes need to be sent to Hyland during the migration readiness stage. If the code is denied or returned for corrections to comply with Hyland standards, it will have to be reviewed again once the corrections are completed and could add time to the approval process.

Any VB Scripts must be converted to Unity Scripts before cloud migration or upgrades.

- + [Custom Code Guidelines \(for OnBase\)](#)
- + [Hyland API FAQ](#)

## ☐ Copy Scan Formats to Re-Configure After Migration

### Notes

To ensure the security of Hyland's servers, users will not be able to use the Thick Client Application for scanning in the cloud as the ODBC to the database will be disconnected (note that the Thick Client is reserved only for Admins in the cloud). If your users are using the Thick Client Application for scanning, consider one of these other methods:

- + [Unity Client](#)
- + [Disconnected Scanning](#)
- + [Sweep Process](#)

So, find and make a copy of the Scan Formats. You'll need this to configure the unity clients once you're migrated to the cloud.



# Hyland Cloud-Ready Checklist

## ☐ Identify Client Specific Switches

Notes

Identify which client switches you have enabled on the applications. You'll want to make a note of this for the migration, as this is added to the environmental requirements later in the process.

Complete List Client Specific Switches

_____	_____
_____	_____
_____	_____

## ☐ Identify Your Current Authentication

Notes

If you are using Active Directory, Hyland recommends you use Identity Provider instead. Identity Provider will work as a multi-factor authentication application with your 3rd Party Application utilization SAML2. Some 3rd Party Authentication Applications supported include but are not limited to:

- + OKTA
- + PingOne
- + Azure

Ensure all usernames are configured in OnBase with the same format. For example:

- + username@email.com
- + FirstInitialLastName
- + FirstNameLastInitial

## ☐ Move to Hyland's Simplified Subscription Licensing Model

Notes

Hyland Software requires OnBase Simplified Subscription licensing within the Hyland Cloud environment. If you are not already on Simplified Subscription licensing, please contact your Account Manager from Naviant to review Client licensing types and quantities for this licensing model.



# Hyland Cloud-Ready Checklist

## ☐ Prepare Processing Files

### Notes

When importing Files to Hyland Cloud, identify DIP, COLD, Visual PDF, and Sweep files. All the files naming convention must be unique. If they're not unique, the cloud processing will flag these as duplicates and will move them to an archived location or will not unzip the files.

*Note for DIP ONLY: Field Order: these cannot contain full paths to look for a document. Since there will be no direct connection to the Full folder paths, this will need to be reviewed. Normally these are changed to File name instead.*

Hyland has SFTP Processing Guidelines within their community site.

## ☐ API Calls

### Notes

Unity APIs is an option to import documents to OnBase. If this is a consideration, the following should be considered to ensure stable functionality:

- + Batches Per Hour License (500/HR, 1000/HR) Discuss these options with your Naviant Account Manager.
- + Dedicated Named User License is needed to avoid disruptions. You can have multiple Dedicated Named User Licenses if multiple processes are being used at the same time.
- + Hyland API FAQ

## ☐ Other Important Pre-Migration Notes

### Notes

- + Any External Reporting Dashboards SQL query reports are not supported in the cloud.
- + Unity Form External Lookups are not supported as a direct lookup to a database.

*Naviant, in partnership with Hyland, has a team of over 100 experts ready to help you migrate your solution to the Hyland Cloud. The Naviant Cloud Center of Excellence (CCE) team has extensive knowledge and years of hands-on experience in cloud migration and is dedicated to providing unparalleled support tailored to your specific needs. With Naviant, you can trust your transition to the Hyland Cloud will be seamless and successful.*

[illegible]



## Prepare for Migration

## Business Process Test Case Scenarios

- + To help and identify your business process, take a moment and sit with your SME's (Subject Matter Experts) on the business process to map out the Business Process Test Case Scenarios.
- + You'll want to ensure that you document what a day-to-day process looks like for your users.
- + The idea is to not only ensure the functionality of the business process and identify any pass/fail items, but it will be used throughout the migration process to ensure that the same business process functionality works just the same when migrated over to the cloud.
- + Example below:

Task	Description	Detail	Pass/Fail	Initials	Question/Concern/Note
	1.1.1 Document Type Group	User is able to select a Document Type Group			
	1.1.2 Document Type	User is able to select a Document Type			
	1.1.3 Document Indexing	User is able to Index Document			
	1.1.4 Import	User is able to Import Document into Outlook			
<b>1.2 Web Client Manual Document Import</b>					
	1.2.1 Hamburger Icon	User is able to see and select the hamburger icon			
	1.2.2 Import Document Option	User is able to see and select the Import Document Option			
	1.2.3 Choose File Button	User is able to see and select the Choose File Button			
	1.2.4 File Explorer	User is able to explore to a folder on their desktop			
	1.2.5 File Explorer File Selection	User is able to select a file to import from the folder			
	1.2.6 Document Type Group	User is able to select a Document Type Group			
	1.2.7 Document Type	User is able to select a Document Type			
	1.2.8 Document Indexing	User is able to Index Document			
	1.2.9 Import	User is able to Import Document into Outlook			
<b>1.3 Outlook Integration Manual Document Import</b>					
	1.3.1 Outlook Tab	User is able to see the Outlook Tab within Outlook			
	1.3.2 Import Button	User is able to see and select the Import Button			
	1.3.3 Import Document Window	Import Document Window Users			
	1.3.4 Email Image	User is able to see the image of the Email within the Import Document Windows			
	1.3.5 Document Type Group	User is able to select a Document Type Group			
	1.3.6 Document Type	User is able to select a Document Type			
	1.3.7 Document Indexing	User is able to Index Document			
	1.3.8 Import	User is able to Import Document into Outlook			

## Train and Get Familiar with the Cloud

- + Log into your premium account and check out these great online training tools:
- + **Hyland Cloud: System Administration (OnBase):**

https://university.hyland.com/learning-paths/I5313?\_gl=1\*6qkbbo\*\_ga\*Nj12NzUxMDQ1LjE2Njk3NDY1MTI.\*\_ga\_PEDPLR7521\*MTY4MTE0MjUxNy4xNDkuMS4xNjgxMTQyNTI5LjAuMCAw\*\_ga\_PGNK86Z1SH\*MTY4MTE0MjUxNy4xNDkuMS4xNjgxMTQyNTI5LjAuMCAw



# Hyland Cloud-Ready Checklist

## Train and Get Familiar with the Cloud, cont.

- + Hyland Cloud: Migrate your OnBase Solution:  
<https://university.hyland.com/learning-paths/I5230>
- + Hyland Cloud: OnBase Migration Go-Live:  
<https://university.hyland.com/courses/e5233>
- + Hyland Cloud: OnBase SFTP Ingestion:  
<https://university.hyland.com/courses/e5254>
- + Hyland Cloud: Migrate your OnBase Solution:  
<https://university.hyland.com/learning-paths/I5230>
- + Hyland Cloud: Using the Cloud Portal:  
<https://university.hyland.com/courses/p2082>
- + Hyland Cloud: Migration Process Overview:  
<https://university.hyland.com/courses/e2074>

## Your Notes

### 1. Request for Environmental Build Request Form Submission

Naviant will submit the environmental build request form to Hyland.

### 2. Prepare to send Database and Disk Groups to Hyland

Database and Disk Groups are provided to Hyland via S3 Bucket or BackFile SFTP  
Hyland will move those over to the new cloud environment and provide status updates as they go along.

- + <https://community.hyland.com/hyland-cloud/Documentation/reference-information/data-transfer-requirements>
- + You will continue to send up delta weekly batches of your Disk Groups after your initial transfer.

### 3. Hyland will Release the Cloud Environment

- + Hyland will begin to build your new cloud environment.
- + From the Submission of the Environmental Build Request Form to Hyland, this process typically takes between 10-12 weeks to release, subject to change based on Hyland's availability.
  - Keep in mind, that the Full Copy of the On Prem Database is absolutely needed before Hyland can complete the build of the environment.
- + Once Hyland has completed the build, they will release the environment to Naviant.



## Your Notes

- [illegible]



## Your Notes

- [illegible]

- + At this point you will want to download and install the appropriate applications onto **ONLY** those users that will be testing the new cloud environment:

[illegible]

- [illegible]

- [illegible]

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## Your Notes

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- [illegible]

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## Your Notes

- [illegible]



# Hyland Cloud-Ready Checklist

## Go Live

## Your Notes

### Go Live Meeting

- + 4 Weeks Before Go Live Date: Naviant will confirm your Go Live date and the timing on a meeting with Hyland.
- + 1 Week Before Go Live Date: Naviant will email Hyland with the Go/No Go Final Decision
- + 2 Days Before Go Live Date: Naviant will create a Teams Support Meeting with you that will be scheduled for a week.
  - During the Go Live Process this Teams meeting and chat group, will be helpful for on-a-moment's notice and quick connection for any issues that you may encounter.

### Go Live Steps

#### Go Live – Step 1: Customer

- + On your start date/time, your steps are as follows:
  - Stop all Processes
  - Stop all Services
  - Lock Out All Users
  - Batch up and send the Final Database and Disk Groups
  - Notify Naviant of Completion

#### Go Live – Step 2: Naviant

- + Naviant will Notify Hyland of Completion of File Transmission

#### Go Live – Step 3: Hyland

- + Hyland will update the Database and add the Disk Groups
- + Hyland will notify when this process is complete to Naviant



# Hyland Cloud-Ready Checklist

## Smoke Testing Procedures

## Your Notes

### Hosted Solution: Check Clients

- + MSI Installs
- + Downloads Page Exists
- + Successful Downloading of all Install Files
- + Successful Login to applications after installation

### Hosted Solution: Module Checks

- + General
  - Solution Reflects Correct Time Zone
  - Expected URLs are provided
    - + Unity Client
    - + Web Client
- + IDP
  - Admin Page
    - + Exists
    - + Login Successful
    - + Web Client Exists
    - + SAML Provider is Created
    - + Clients are created
    - + Web Client Login Successful
    - + Unity Client Login Successful
- + Scheduler
  - Scheduler Service Exists
    - + Unity Management Console



## Your Notes

- [illegible]

- + Access
  - Login Successful
- + Applications
  - Thick Client – Application Exists
  - Thick Client – Login Successful
  - Configuration Client – Application Exists
  - Configuration Client – Login Successful
  - Diagnostics Console – Application Exists
  - Diagnostics Console – Launches and shows data



## Your Notes

- [illegible]



## Your Notes

- [illegible]



# Hyland Cloud-Ready Checklist

## URLs

Cloud Documents and Guidelines: <https://community.hyland.com/hyland-cloud/Documentation/reference-information>

Monitoring and Alerting Hosted Solutions: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/monitoring-and-alerting-for-hosted-solutions>

Cloud Solution Contacts: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/getting-started-in-the-hyland-cloud/cloud-solution-contacts>

Cloud Portal: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/getting-started-in-the-hyland-cloud/cloud-portal>

Cloud Portal: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/getting-started-in-the-hyland-cloud/cloud-portal>

Citrix: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/getting-started-in-the-hyland-cloud/citrix-in-the-hyland-cloud>

Delivery Timeframes: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/getting-started-in-the-hyland-cloud/delivery-timeframes>

Migration Overview: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/migration-overview>

Hyland Cloud Maintenance Window FAQ: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/hyland-cloud-maintenance-window-faq>

Hyland API FAQ: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/design-considerations/hyland-api-faq>

Distribution Services: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/design-considerations/distribution-services>

Custom Code Guidelines (for OnBase): <https://community.hyland.com/hyland-cloud/Documentation/reference-information/design-considerations/custom-code-in-the-hyland-cloud>

Data Transfer Requirements: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/data-transfer-requirements>

Backfile Project Using NAS Device: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/data-transfer-requirements/backfile-project>

Secure File Transfer: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/data-transfer-requirements/secure-file-transfer>



## Hyland Cloud-Ready Checklist

### URLs, cont.

Document Ingestion and Processing: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/data-transfer-requirements/document-ingestion-and-processing>

Compliance: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/security-and-compliance/Compliance>

Network Basics: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/security-and-compliance/network-basics>

Security Requirements: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/security-and-compliance/security-requirements-in-the-hyland-cloud>

Hyland Cloud Disaster Recovery Plan Executive Summary: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/security-and-compliance/hyland-cloud-disaster-recovery-plan-executive-summary>

OnBase Upgrades: <https://community.hyland.com/hyland-cloud/Documentation/reference-information/upgrades-in-the-hyland-cloud>



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