## 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

☐ 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 Simplifed Subscription Licensing Model
☐ Prepare Processing Files
☐ API Calls



**Master 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**

- 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.



☐ 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 <b>S3 Bucket user guide.</b>	
Less than 1TB 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
Identify Your Customer Security Administrator(s)  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.	Notes
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## Document All of Your Software Integrations Identify any applications that integrate with OnBase. Documenting these integrate with OnBase.

**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



## ☐ 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.



☐ 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 Simplifed 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.	



## 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

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.

+ Unity Form External Lookups are not supported as a direct lookup to



a database.

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## Migration Expectations: What You Can Expect During the **Hyland Cloud Migration Process**

## **Prepare for Migration**

It is important that you are familiar with your On Prem Solution as it is today.

#### **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
14.	5 Document Type Group	User is able to select a Document Type Group			
1.1/	i Document Type	User is able to select a Document Type			
14	Document Indexing	User is able to Index Document			
132	Import.	User is able to Import Document into OnBase			
1.2 Web Client Manual Document Import					
1.2.	l Hamburger Icon	User is able to see and select the hamburger icon			
1.2.	Import Document Option	User is able to see and select the Import Document Option			
12.	Choose File Button	User is able to see and select the Choose File Button			
1.2	file Explorer	User is able to explore to a folder on their desktop			
12.	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	2 Document Type	User is able to select a Document Type			
12	B Document Indexing	User is able to Index Document			
12:	Import.	User is able to Import Document into OnBase			
1.3 Outlook Integration Manual Document Import					
13.	OnBase Tab	User is able to see the OnBase Tab within Outlook			
1.3.	Import Button	User is able to see and select the import Button			
1.3.	Import Document Window	Import Document Window Opens			
		User is able to see the image of the Email within the import			
1.3.	Email Image	Document Windows			
1.8.	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			
1.8.	Document Indexing	User is able to Index Document			
1.3-	Import.	User is able to Import Document into OnBase			

#### Train and Get Familiar with the Cloud

We highly recommend that you review the following steps.

- + 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\*N jl2NzUxMDQ1LjE2Njk3NDY1MTI.\*\_ga\_PEDPLR7521\*MTY4MTE0MjUxNy4xND kuMS4xNjgxMTQyNTI5LjAuMC4w\*\_ga\_PGNK86Z1SH\*MTY4MTE0MjUxNy4xND kuMS4xNjgxMTQyNTl5LjAuMC4w

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Train and Get Familiar with the Cloud, cont.	Your Notes
+ Hyland Cloud: Migrate your OnBase Solution:	
https://university.hyland.com/learning-paths/l5230	
+ 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/l5230	
+ Hyland Cloud: Using the Cloud Portal:	
https://university.hyland.com/courses/p2082	
+ Hyland Cloud: Migration Process Overview:	
https://university.hyland.com/courses/e2074	
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- informa tion/data-transfer-requirements	
<ul> <li>You will continue to send up delta weekly batches of your Disk Groups after your initial transfer.</li> </ul>	
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.	
<ul> <li>Keep in mind, that the Full Copy of the On Prem Database is absolutely needed before Hyland can complete the build of the environment.</li> </ul>	
+ Once Hyland has completed the build, they will release the environment to Naviant.	



4. Naviant will test

## + Before releasing the environment to you, Naviant will log in and run a few simple tests. Some tests may be: · Naviant Smoke Testing: + Smoke Testing is small initial smoke test. + This testing only involves basic testing features such as: Logging into Citrix + Seeing the Administrator applications · Thick Client Configuration • Diagnostics Consoles · Logging into OnBase Applications · Retrieving Documents · Importing Manually a Document · Logging into the SFTP for Regular business use • Sending up files via SFTP to test DIPs, COLDs, etc. · Importing and retrieving documents · Access to all applications in general Naviant will prepare and may configure the environment so that they now point to the new cloud paths. • Some of the items that may be involved in these updates are, but not limited to, the following items: + COLD Paths + DIP Paths + PDF COLD Paths + SWEEP Paths + Autofill Paths + Workstation registrations Authentication • If you have chosen to use Hyland IdP with SAML2 authentication, this will be the time that this is getting installed and configured as well. + Your 3rd party authentication Metadata URL is provided to Naviant by you SSO Team. + Naviant will provide the above URL to Hyland to configure.



4.	Naviant will test, cont.	Your Notes
+	Authentication, cont.	
	<ul> <li>After Hyland Configures their piece, Naviant will configure the IdP Clients for your applications (Unity Client, Web Client, REST API, etc.), within the IdP Admin portal.</li> </ul>	
	<ul> <li>Naviant will provide you with the IdP SAML Metadata URL and provide it to you for your SSO team to wrap up their side of the con figuration process.</li> </ul>	
	+ Test authentication.	
+	Naviant will then release the environment to you.	
	• With this release, Naviant will send you the following:	
	+ Environmental Documentation	
	+ Loose Files/Install Files	
	<ul> <li>Service Locations for prepare for the installs</li> </ul>	
	+ Credentials provided by Hyland for Access	
5.	Initial User Testing	
+	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:	
Ur	ity Client (If Applicable)   Studio (If Applicable)   Unity Management Console (If Applicable)	
+	You will also want to ensure that your admins are able to log into the Hyland Citrix web application and are able to launch the Configuration and Thick Client Applications.	
	Citrix: https://hyland.cloud.com/	
+	Create and Access your My Cloud Account	
	<ul> <li>My Cloud will be a very helpful tool. Here you will be able to see files that go through your SFTP process, List of all your Services, and the URLs for all of your applications.</li> </ul>	
	You will be able to restart services through this site as well.	
	<ul> <li>My Cloud: https://mycloud.onbaseonline.com/</li> </ul>	



5. Initial User Testing, cont.	Your Notes
+ Smoke Testing	
Smoke Testing is small initial smoke test.	
+ This testing only involves basic testing features such as:	
Logging into Citrix	
+ Seeing the Administrator applications	
Thick Client	
Configuration	
Diagnostics Consoles	
Logging into OnBase Applications	
Retrieving Documents	
Importing Manually a Document	
<ul> <li>Logging into the SFTP for Regular business use</li> </ul>	
+ Business Process Test Case Scenarios	
<ul> <li>Remember those Test Cases you created in the beginning? It's time to take them out! Here you will take between 1-2 weeks to FULLY test your new environment. Ensure that all your test cases are Passes. Report any</li> </ul>	
The more detailed you are in testing the better your solution will be when you Go Live. TEST, TEST, TEST!!!	
6. Continuous Batching and File Transfer of the Disk Groups	
+ Hyland does require that you continue to send up delta disk groups weekly until go live.	
<ul> <li>This is done to cutdown on the file transfer on the eve of Go Live.</li> </ul>	
<ul> <li>https://community.hyland.com/hyland-cloud/Documentation/reference-information/data-transfer-requirements</li> </ul>	
7. On Prem Solution and Day-to-Day Processing before Go Live	
+ While you are testing your new Cloud environment and continuing to send up	
files to Hyland. You will continue to use the On Prem solution for your day-to- day processing.	





## 8. Thinking Ahead of Go Live

- + Installations will be done via MSI installs.
  - Plan how this deployment will occur on the eve of Go Live.
- + URLs to Web Clients, Shared Unity Forms, etc.
- + Plan the process of switching these over to the new URLs on the eve Go Live.
  - Testing the Manager Account Log in Credentials on Prem
- + On the Eve of Go Live you will need to log in with the Manager Account and Lock all the users out of your On Prem solution.
  - If you do not know these credentials and you have not tested that you are able to log in, it may be that you will not be able to unlock the environment if needed, for rollbacks, if necessary.




G	o Live	Your Notes
G	o 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.	
	<ul> <li>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.</li> </ul>	
G	o Live Steps	
G	o 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	
G	o Live – Step 2: Naviant	
+	Naviant will Notify Hyland of Completion of File Transmission	
G	o Live – Step 3: Hyland	
+	Hyland will update the Database and add the Disk Groups	
+	Hyland will notify when this process is complete to Naviant	



## **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





## **Smoke Testing Procedures, cont. Your Notes** + Distribution · Distribution Service Exists + Unity Management Console · Notifications are sent as expected + Mailbox Importer · Service ready for configuration **Hosted Solution: Citrix** + 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





## **Hosted Solution: Cloud Portal Your Notes** + Cloud Admin Portal - Login Successful + CSA's · Can see all CSA's listed in the Admin Portal + Solution Services + Services - Exist on the portal + Services - Reflects "up" Status + Services - Restarts successfully • URLs + URLs - Expected URLs Exist + URLs - Reflects "up" Status + URLs - Pools restart successfully Processing Files + SFTP directory Structure Exists • SFTP: + WinScp - Login Successful





## **Hosted Solution: Cloud Portal Your Notes** + Cloud Admin Portal - Login Successful + CSA's · Can see all CSA's listed in the Admin Portal + Solution Services + Services - Exist on the portal + Services - Reflects "up" Status + Services - Restarts successfully • URLs + URLs - Expected URLs Exist + URLs - Reflects "up" Status + URLs - Pools restart successfully Processing Files + SFTP directory Structure Exists • SFTP: + WinScp - Login Successful



#### **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/get-ting-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





### **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









