Hyland®

MOVING TO THE HYLAND CLOUD

6 SIMPLE STEPS TO MIGRATE YOUR ON-PREMISES SOLUTION TO A HOSTED VERSION

READY TO MAKE THE MOVE?

Look, we know the concept of moving your on-premises OnBase solution to the Hyland Cloud might be causing a bit of anxiety, but it really shouldn't.

The overall process looks the same regardless of your solution's complexity. It's a process we've mastered, making sure the transition from on-premises to the cloud goes without a hitch and keeps down time to a minimum.

Curious how that process works? Read on to get a quick overview.

HEY, REAL QUICK...

We're making a few assumptions about your solution when we talk about this general migration process.
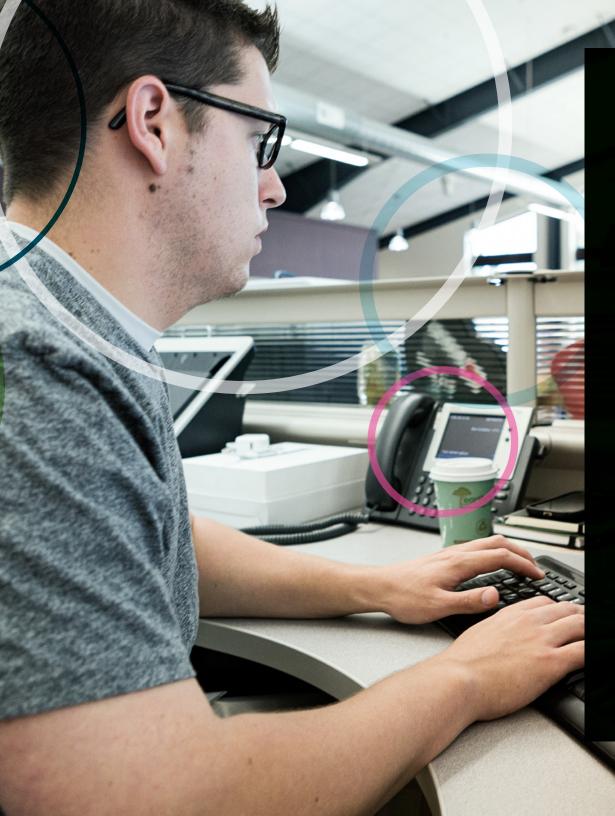
We assume:

All of the modules you are expecting to use in the Hyland Cloud work as expected

You are using Microsoft SQL Server as your database platform

You have a version of OnBase supported in the Hyland Cloud

If any of these three things don't apply to your solution, it's not a problem. We may need a different discussion about how best to customize your migration.

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STEP 1:
DELIVER A COPY OF YOUR SOLUTION TO HYLAND

Make sure to include:

- A backup of your database
- Your disk groups
- Any other files needed for the solution

IMPORTANT STUFF

Remember what you shared with Hyland, especially with disk groups. You don't want to send duplicate data during updates before "go live." Avoid this by promoting them all just prior to database backup.

Once Hyland has the data, we'll start setting up its new home in our cloud.

STEP 2:
TESTING, TESTING, TESTING

Your cloud solution is ready for testing, so get in there and test away. Track your changes and we'll track ours, then together we will apply those changes during "go live."

BUT WAIT, THERE'S MORE

While we're testing the solution, you can upload data, i.e. disk groups, as you continue to use your on-premises solution. And we want you to. This helps ensure the smallest amount of final data possible when it's time to "go live." Keeping disk groups up-to-date in the Hyland Cloud will greatly benefit the "go live" schedule.

STEP 3:
IT'S A DATE

Once all testing is complete and the solution is working as expected, we'll schedule the "go live" date. Note that during the "go live" process, your production solution will need to be offline.

Hyland will try to accommodate the most convenient time for you when we schedule the "go live" — including nights and weekends — to minimize day-to-day disruptions.

PATIENCE IS A VIRTUE

We know you're excited to launch your solution; or you might believe that setting a deadline will help motivate the team to complete work faster. Experience has taught us to recommend that you wait until testing is complete before setting a "go live" date. This avoids schedule changes due to unforeseen delays.

STEP 4:
READY TO LAUNCH

There are a couple of things we need to do before we can go live.

FIRST: Stop all on-premises solution work. A clean cutover from on-premises to cloud-hosted is best, so tell your users to avoid transaction creation in the on-premises solution during the final migration.

SECOND: Remember that parallel project we talked about (back on Page 4)? Now is the time to upload a fresh database backup and that remaining disk group data. Its size is generally the largest time constraint in the "go live" timeline.

STEP 5:
LET'S TEST THAT ONE MORE TIME

The data's received, the final disk groups are in place, the database is restored and we've made all the changes noted during the initial testing phase. Before we go live, this is a good time to give the solution one last look.

Let's give the solution one last round of testing to make sure everything is operating as expected.

STEP 6:
IT'S LIVE!

We did it. We went through all the steps necessary to make the move from an on-premises solution to one hosted in the Hyland Cloud. Now you can reap all the benefits of this strategic decision:

PRIVATE
Data is never co-mingled with other organizations' data

MANAGED
Data centers retain responsibility of keeping data safe — both digitally and physically

SECURE
Strict security protocols provide superior security than most customers could provide themselves

SUPPORTED
More than 100 credentialed cloud services professionals provide 24/7/365 support
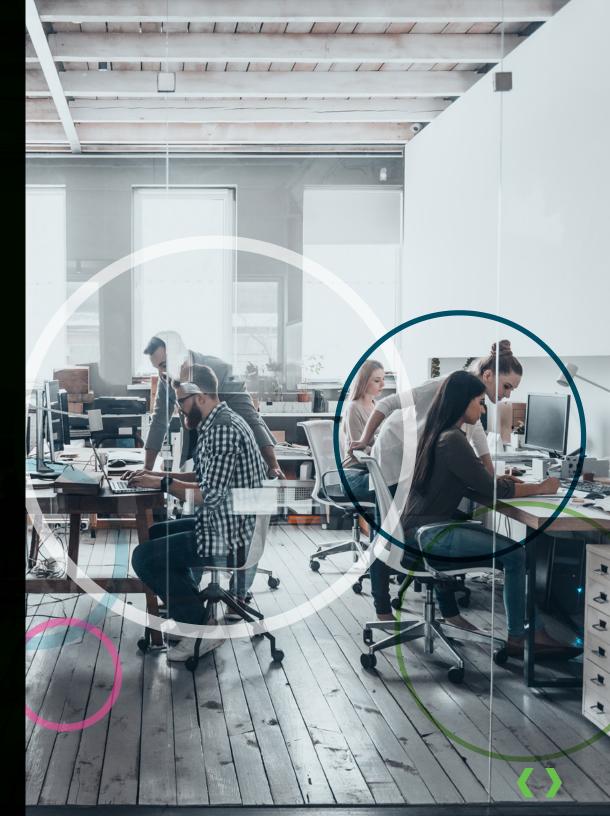
RELIABLE
Since the inception of our cloud, customers' data has been available with 99.99 percent uptime

LOCAL
Complete transparency means customers choose the country in which all copies of their content is stored

COMPLIANT
Accommodates demanding SLAs and compliance/ regulatory requirements

CHECKLIST

A quick overview of the Hyland Cloud migration process for your reference:

Make a complete backup of the system

Promote all disk groups just prior to the database backup

Hyland receives the solution data, deploys the solution for testing and tracks all changes

Test the released solution and track all changes

Send disk group deltas during the testing process, making the final data needed at "go live" as small as possible

Complete testing

Determine a "go live" schedule

At the start of "go live," turn off on-premises production solution

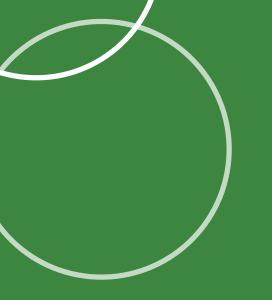Send a full database backup and any remaining disk group data

Hyland restores the database and puts the final disk groups in place

Hyland makes all needed changes to allow the solution to be hosted

Make needed changes to allow the solution to be hosted

Solution released for final testing

Solution is live in the Hyland Cloud

NEED MORE INFORMATION ABOUT MIGRATING TO THE HYLAND CLOUD?

Download our technical paper, **"Moving to the cloud: How to move an OnBase on-premises solution to the Hyland Cloud"**

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