

Migrating to Series25 SaaS Environment Checklist

Intended Audience

This document is intended to be used by existing Series25 customers who have a Database at Customer Site (DBCS) environment and are migrating to a Series25 Software as a Service (SaaS) environment.

Series25 SaaS Migration Team

Before beginning the Series25 SaaS Migration process, your campus should assemble a Series25 SaaS Migration Team that contains these members:

- **Project Manager** - Oversees the entire migration to Series25 SaaS project (may be same person as Functional Administrator)
- **DBA or Network Administrator** - Extracts and sends database Snapshots.
- **Series25-SIS Interface Administrator(s)** - Installs and runs the SIS Interface.
- **Series25 Functional Administrator**
- **Key Academic Scheduler(s)** - Runs Schedule25 in local R25 or 25Live Optimizer. May also run the SIS Interface.
- **Key Events Scheduler(s)** - Run R25 and/or 25Live tests on behalf of users
- (If applicable) **LDAP or Shibboleth Administrator** - See Authentication related checklist items.
- (If applicable) **WebServices Programmer(s) or Interactive Reports Designer User(s)** - See Custom Reports related checklist items.

Series25 SaaS Migration Checklist

The migration team should review this SaaS Migration Checklist. The checklist outlines the steps of a successful SaaS migration. For questions, please contact your Series25 Account Manager or series25implementation@collegenet.com.

Phase 1 - Data Gathering		
<input type="checkbox"/>	1	SaaS contracts completed. Series25 Account Manager sends follow-up e-mail requesting: <ul style="list-style-type: none"> • Schedule of SaaS migration planning call • Data needed for migration
<input type="checkbox"/>	2	Campus Project Manager: <ul style="list-style-type: none"> • Returns completed SaaS Migration Questionnaire • Schedules SaaS migration call with Account Manager & campus SaaS Migration Team.
<input type="checkbox"/>	3	SaaS Migration Team & Account Manager complete SaaS migration planning call
<input type="checkbox"/>	4	DBA runs referential integrity scripts and clear out any database orphans this script reveals. See the following wiki page: http://knowledge25.collegenet.com/display/Series25/Removing+Orphan+Records
<input type="checkbox"/>	5	DBA takes "Initial Snapshot" of Series25 production database and uploads to CollegeNet FTP site. Follow database extraction and sending instructions here: http://knowledge25.collegenet.com/display/Series25/Send+CollegeNET+Your+Database <ul style="list-style-type: none"> • If local DBMS is Microsoft SQL Server, send .bak file. • If local DBMS is Oracle, send .dmp file. <p>Once uploaded, please e-mail support@collegenet.com (cc'ing your Account Manager). Support will assign a Technical Migration Analyst who will handle the database uploads and other technical questions related to your campus' SaaS migration.</p>
<input type="checkbox"/>	6	(If Applicable): If migrating from <u>DBCS Resource25</u> : <ul style="list-style-type: none"> • Project Manager sends Account Manager list of active Resource25 username(s). CollegeNET uses list to create Citrix account username(s). Citrix is how Resource25 is accessed in SaaS.
<input type="checkbox"/>	7	(If Applicable): If migrating from <u>DBCS WebViewer</u> : <ul style="list-style-type: none"> • Network administrator uploads WebViewer customization files to FTP: 1) .zip of wv3 folder (<i>found on WebViewer's web server</i>); 2) hts folder (<i>found on application server</i>). Once uploaded, please e-mail support@collegenet.com (cc'ing your Account Manager). • Project Manager sends Account Manager WebViewer Seat Credentials (<i>username and password</i>) & reviews additional WebViewer testing steps below.

<input type="checkbox"/>	8	<p>(If Applicable): If migrating from <u>DBCS 25Live</u>:</p> <ul style="list-style-type: none"> • Project Manager sends Account Manager 25Live Viewer Seat username and password. • (If Applicable): If using 25Live Publisher, Network Administrator locates .zip of all Publisher feed and cache files, so they can be sent to CollegeNet FTP during final migration. • (Uncommon) If using BPE, Project Manager or Network Administrator sends support@collegenet.com event_put BPE files & reviews additional BPE testing steps below.
<input type="checkbox"/>	9	<p>(If Applicable): If DBCS environment has enabled <u>Authentication</u> (e.g. LDAP, Shibboleth), LDAP or Shibboleth Administrator:</p> <ul style="list-style-type: none"> • Sends support@collegenet.com LDAP file (<i>r25-ldap.ini</i>) or Shibboleth attributes • Sends Account Manager non-expiring LDAP or Shibboleth account for Support access • Open any necessary ports, as defined in the 25Live Technical Specifications (SaaS option) - http://knowledge25.collegenet.com/download/attachments/34930709/25Live_TechSpecs.pdf • Reviews additional Authentication related steps below.
<input type="checkbox"/>	10	<p>(If Applicable): If DBCS environment has existing <u>Custom Reports</u>:</p> <ul style="list-style-type: none"> • If report(s) are written in Series25 WebServices, Network Administrator uploads .zip of all report files to CollegeNet FTP (found in the folder - <WebServices (ASV) installation directory>\reports\std\lws). • If report(s) are written in Crystal, WebServices Programmer(s) or JReport Designer User(s) re-writes the Crystal report(s) with WebServices or using the 25Live Interactive Reports Designer • Project Manager reviews additional Custom Report testing steps below.
<input type="checkbox"/>	11	<p>(If Applicable): If DBCS environment has existing <u>direct Series25 database queries(s) or 3rd party Integration(s)</u>:</p> <ul style="list-style-type: none"> • Direct Series25 Database queries should be re-written in Series25 WebServices. • If 3rd party integrations use Series25 WebServices, Project Manager define a testing plan for testing integration's connection to SaaS WebServices + plans final migration day steps. • If 3rd party integrations don't use Series25 WebServices, Project Manager defines how to address integration(s). • Project Manager reviews additional direct Series25 database queries(s) or 3rd party Integration(s) testing steps below.
<input type="checkbox"/>	12	<p>CollegeNET IT uses received data to build SaaS environment. Once built, Account Manager sends campus Project Manager Series25 SaaS Environment Credentials.</p>
<p>Phase 2 - SaaS Environment Testing</p>		
<input type="checkbox"/>	13	<p>DBA resolves any import errors found and sent by CollegeNet Technical Analyst.</p>
<input type="checkbox"/>	14	<p>On campuses who use <u>Colleague</u>, Series25-SIS Administrator <u>installs and tests SaaS Interface Connector</u>, using these instructions: http://knowledge25.collegenet.com/display/Series25/Interface+Connector</p> <p>On all other campuses who use <u>other SISs (e.g. Banner, PeopleSoft, etc)</u>, Series25-SIS Administrator <u>upgrades Series25-SIS Interface</u> to latest version, using these instructions: http://knowledge25.collegenet.com/display/Series25/Series25-SIS+Interface+v3.4+Installation+Instructions</p>
<input type="checkbox"/>	15	<p>Functional Administrator, Project Manager, Series25-SIS Interface Administrator(s), and/or Key Academic Scheduler(s) complete these <u>SaaS SIS Interface</u> test steps:</p> <ul style="list-style-type: none"> • Configures local Series25 and SaaS Series25 users and security groups so that the Interface User is in the System Administrators (-1) group and has a valid email address. This is required for the new and faster Asynchronous vCalendar Import process service used by the Interface in the SaaS environment. • Complete a batch load of full term. • Move at least one course via transactional processing. • Send a room assignment from Series25 SaaS to SIS. <p>For more in depth Interface testing steps, please use this page - http://knowledge25.collegenet.com/display/CustomResources/SaaS+Migration+Interface+Testing</p>
<input type="checkbox"/>	16	<p>Project Manager shares SaaS credentials with Key Academic and Events Scheduler(s). Then, Key Academic and Events Scheduler(s) test their ability to log into <u>R25i</u> (via Citrix) and <u>25Live</u> (via web browser) and test the following core scheduling tasks:</p> <ul style="list-style-type: none"> • Create events • Edit existing events • Run reports • Save files to local desktop • E-mail reports

<input type="checkbox"/>	17	(If Applicable): If migrating DBCS <u>WebViewer</u> , Key Event Schedulers test it by: <ul style="list-style-type: none"> • Verify SaaS WebViewer URL is accessible and site looks like DBCS WebViewer • Browse WebViewer events and other data • Enter test request(s)
<input type="checkbox"/>	18	(If Applicable): If using DBCS <u>Schedule25</u> , Key Academic Scheduler test by doing the following <ul style="list-style-type: none"> • Complete a Schedule25 run in R25i (or Schedule25 Optimizer if 25Live is used locally). • Follow guidelines for server-side file saving for Schedule25 on this wiki page: http://knowledge25.collegenet.com/display/Series25/Setting+up+SaaS+Schedule25+Run+File+Locations
<input type="checkbox"/>	19	(If Applicable): If migrating DBCS 25Live <u>BPE</u> , Functional Administrator test it's functionality in SaaS.
<input type="checkbox"/>	20	(If Applicable): If migrating DBCS <u>Authentication</u> , LDAP or Shibboleth Administrator tests connectivity and ensures users can authenticate into SaaS 25Live or R25i (LDAP only).
<input type="checkbox"/>	21	(If Applicable): If migrating DBCS <u>Custom Reports</u> , WebServices Programmer(s), Interactive Reports Designer User(s) and functional users test reports in SaaS.
<input type="checkbox"/>	22	(If Applicable): If migrating DBCS <u>direct Series25 database querie(s) or 3rd party Integration(s)</u> test this functionality in SaaS.
<input type="checkbox"/>	23	Project Manager e-mails Account Manager to indicate successful completion of all SaaS environment testing steps, or signs and returns this checklist, thereby indicating successful completion of all previous testing tasks and opening final phase.
Phase 3 - Final Migration		
<input type="checkbox"/>	24	Project Manager works with SaaS Migration team to <u>pick a SaaS cut-over day</u> , keeping these items in mind: <ul style="list-style-type: none"> • CollegeNET can complete final migrations Monday through Thursday of each week. • Final Database Snapshot should be sent night before date of final migration. With the Snapshot loaded the night before, the CollegeNET Technical Migration Analyst assigned to your SaaS migration can begin uploading the Snapshot first thing on the SaaS cut-over day. • After Snapshot is taken, Series25 environment should be turned off. Functional Users shouldn't access the DBCS Series25 environment after this Final Snapshot is sent. The next time Functional Users access Series25, they will be using only their Series25 SaaS environment. • Expect a maximum of 48 hours of downtime during migration. • To reserve the final cut-over date, you must e-mail support@collegenet.com (cc'ing your Account Manager) the preferred date/time for your migration. We will confirm this date works based on current availability. • Be sure to establish communication strategy that alerts all Series25 users that migration to SaaS is imminent.
<input type="checkbox"/>	25	On the <u>night before SaaS cut-over day</u> , DBA will: <ul style="list-style-type: none"> • Create "Final Snapshot" of Series25 production database and uploads it to CollegeNET FTP • E-mail support@collegenet.com (cc'ing Account Manager) once the Final Snapshot file has been loaded. • Disable any automatic database backups. • (If Applicable): If using DBCS 25Live Publisher, upload .zip of all Publisher feed and cache files to CollegeNet FTP. <p>And the Network Administrator will:</p> <ul style="list-style-type: none"> • Turn off access to Series25 products on campus, preventing users from entering data into Series25 DBCS environment. • Disable SIS Interface CRON • Re-direct any 3rd party integrations to SaaS environment • (If Applicable): Redirect DBCS WebViewer URL to the new SaaS WebViewer URL

<input type="checkbox"/>	<p>26 On the <u>day(s) of SaaS cut-over</u>, CollegeNET Technical Migration Analyst will:</p> <ul style="list-style-type: none"> • Receive Final Snapshot and begin loading the data into SaaS environment. • Release final SaaS environment to Project Manager after Final Snapshot is loaded and basic tests are completed. <p>Upon receiving final environment, the Network Administrator will:</p> <ul style="list-style-type: none"> • Cut-over to Series25-SIS SaaS Interfaces. • Re-enable SIS Interface CRON. • Begin disabling old, now unused Series25 servers and hardware. <p>And the campus Project Manager will:</p> <ul style="list-style-type: none"> • Work with Migration Team to re-complete key functional testing steps described above (especially Series25 SIS Interface related testing). • Alert all Series25 users that migration to SaaS is complete and new SaaS environment is accessible. All Users should begin entering data solely into SaaS environment. • Keep an eye and ear out for any users having trouble accessing new SaaS environment.
<input type="checkbox"/>	<p>27 Migration complete.</p>

Customer Signature: _____ Date: _____
CollegeNET Signature: _____ Date: _____