

Product description

d.velop cloud migration

1 Overview

The functionalities and service contents of d.velop cloud migration are described below. The "Product Description d.velop cloud platfor" applies in addition to d.velop cloud customers. The support, availability and update services of d.velop cloud migration are described in the "Service Level Agreement."

d.velop cloud migration allows for the migration of documents and dossiers from a d.velop on-premises system to the d.velop cloud. The application is based on an export from the customer's on-premises source system. It applies configured assignments of categories, properties, users and groups, takes other settings into account, and then carries out the migration to the cloud at the touch of a button. The migration can also be monitored from the user interface without requiring access to the on-premises system.

2 Architecture

d.velop cloud migration consists of two components, both of which are required for the migration. Firstly, the d.velop cloud migration app is required, which can be used in order to assign categories, properties, users and groups as well as to configure, start and monitor the migration. Secondly, the customer is also required to download the d.velop cloud migration connector (EXE file). This component is run and configured locally on a client, connects to the target system and performs the migration when it is initiated via the app user interface.

3 Range of functions

In addition to the content described in section 2, d.velop cloud migration offers the following range of functions.

3.1 Validation of the documents and metadata

During the migration process, a validation of the migration capability of the documents and metadata always takes place. The metadata is checked for a valid JSON format and for the data types of the document properties. The metadata and document data are checked against one another by comparing the number of versions in the metadata and the file sizes of the versions with the document data. Information missing from the metadata which is necessary for the migration, such as the file name, file size and hash values of the versions, is also checked. If errors are detected in the underlying export during the validation, the affected documents are marked with the status of a validation error, logged for the user and no longer taken into account for the further migration. If a migration error of this kind occurs, these documents will not be migrated.

Missing hash values can constitute an exception. Through an explicit configuration which is also logged in the migration report, a migration can be enabled for documents without a hash value, which means that a hash value verification is not necessarily carried out. The d.velop documents migration API in the target system will not perform a hash value verification if a document's source system does not have a hash value, but a validation of the file sizes of each document version still takes place. Migrations without a hash value verification can lead to faulty migrations. No liability is assumed for a migration without a hash value verification.

3.2 Overview of the migration

The progress of the migration can be monitored from the d.velop cloud migration app user interface without requiring access to the on-premises system. The d.velop cloud migration connector sends a status update to the d.velop cloud migration app in the target system at regular intervals, which allows you to track the percentage progress of the migration, the number of documents that have been migrated, transformed and validated, and the number of documents that have migration errors (such as validation or upload errors).

3.3 Reporting and analysis options

Once the migration is complete, the d.velop cloud migration connector automatically creates a migration report that shows which settings and assignments were selected, which documents were successfully migrated as well as which documents were not successfully migrated and with what error message. The information is provided in a protected PDF report and additional CSV files. The hash values of the CSV files are recorded in the protected PDF report so that any changes to the CSV files can also be detected at a later date.

In addition, a separate <Document ID>.log file is created for each document in the export, which logs the actions that were performed on the document during the migration.

3.4 Performing transformations

There is the option to make metadata corrections during the migration process, allowing known migration errors attributable to incorrect data in the source system to be automatically corrected through the validation. The enabled transformations are logged in the migration report and the specific transformations are logged to the documents in the document logs.

The following transformations can be enabled:

- Setting of the file size on the basis of the current file if the file size is not set
- Correction of the file size if this differs from the actual export in the metadata
- Setting of the file name to the DocId if the file name is not set
- Change the document version numbers to sequential numbering (e.g. 1,2,3,4 instead of 1,3,5,6).

3.5 Advanced migration settings

There is also the option to enable two advanced migration settings that affect the processing after the migration in the target system. The enabled settings are logged in the migration report.

The following settings can be enabled:

- Create new dossier scheme
- Create new full text and rendition

3.5.1 Create new dossier scheme

The links between documents and dossiers can be recreated on the basis of the structure previously defined in the target system. In this case, the links from the source system are completely discarded.

3.5.2 Create new full text and rendition

The full text and the rendition versions of a document can be recreated in the target system. Any full text and rendition versions from the source system that may have been transferred will be discarded. This function can be used if there is no full text in the source system but the full text search is to be permitted in the target system.

3.6 Perform delta migrations

It is often the case while a migration is being performed that the source system frequently remains in use. To ensure that changes to documents and newly imported documents are migrated despite this, d.velop cloud migration also allows for the performance of delta migrations. To be able to do this, it is necessary for the respective documents to be exported beforehand. When reading in documents, the d.velop cloud migration connector checks the most recent change date of the document in the metadata ("dateOverallProc"). Documents that have already been successfully migrated will be automatically re-migrated if the current date is more recent than the saved date of the previously migrated document. New documents are always migrated.

3.7 Web frontend

All user interfaces can be used via a current web browser (Chrome, Safari, Edge).

3.8 Authentication

The authentication of the user takes place via the d.velop platform. The corresponding requirements are detailed in the d.velop cloud platform product description.

4 Provisioning

d.velop cloud migration is provided exclusively in the form of a cloud product. This does not include the d.velop cloud migration connector, which can be acquired via the cloud app, but which is run locally for migration to the cloud.

5 Technical requirements

The d.velop cloud migration connector has to be run on an on-premises client/system of the customer. The requirements of the operating system are detailed here: <https://help.d-velop.de/docs/en/pub/cloudshift-for-documents/cloud/installation-and-uninstallation/system-requirements>

An Internet connection to the target system is also necessary. Further details are provided here: <https://help.d-velop.de/docs/en/pub/cloudshift-for-documents/cloud/installation-and-uninstallation/enabling-the-default-port-for-dvelop-cloudshift-for-documents-connector>

The following also applies:

- requirements for a cloud migration: <https://help.d-velop.de/docs/en/pub/leitfaden-cloudmigration-documents/cloud/general-information-about-this-guide/prerequisites-for-a-cloud-migration>
- constraints and obstacles relating to a cloud migration: <https://help.d-velop.de/docs/en/pub/leitfaden-cloudmigration-documents/cloud/general-information-about-this-guide/limitations-and-obstacles-to-a-cloud-migration>

6 Disclaimer of warranty / responsibilities

Migrating to a target system with d.velop cloud migration is only one part of the migration process. The desired documents and dossiers have to be selected first, for example, then the export has to be carried out and the export must then be saved on a hard disk. After the migration, the customer is required to perform a completeness check to compare the source system with the target system. The described activities before and after a migration are not carried out with d.velop cloud migration. d.velop therefore assumes no liability for the complete and correct transfer of the documents and dossiers from the source system to the target system during the migration process.

The correctness of the assignments of categories, properties, users and groups cannot be checked by d.velop cloud migration. d.velop therefore assumes no liability for the technical correctness of the configured assignments. Before the productive migration, it is necessary for at least one test migration to be carried out and accepted by the customer.

The generated migration report, CSV files, migration database, logs and document log files are created by the d.velop cloud migration connector. d.velop assumes no responsibility for the retention of these files. To ensure traceability of the migration, it is also necessary for the files to be stored securely after the migration. The logs created during the entire migration process for the export, completeness checks and other activities performed on the documents and dossiers should also be stored securely for traceability purposes.

7 Limits

Title	Limit	Annotation
Number of documents und dossiers in a migration	300,000,000	/
Allocation of properties	only same data type allowed	Data types: Alphanumeric, numeric, currency, date, date-time, each as a single or multiple field