# Questionnaire Data Migration

Date:

**NOTE:** For an initial indicative evaluation, a subset of fields (highlighted in green) would be kindly requested.

|  |  |  |
| --- | --- | --- |
| **1 Customer** | | |
| 1.1 Company |  | |
| 1.2 Contact Person |  | |
| 1.3 Position / Department |  | |
| 1.4 Address |  | |
| 1.5 Phone |  | |
| 1.6 Fax |  | |
| 1.7 E-Mail |  | |
| 1.8 Remarks |  | |
|  | | |
| **2 System to Be Replaced (Source System)** | | |
| 2.1 Source System (Data Management / Document Management) | Name:  Version: | |
| 2.2 Operating System | Name:  Version: | |
| 2.3 Database | Name:  Version: | |
| 2.4 Storage System or Software | Name:  Version: | |
| 5 Storage Medium or Media | Primary: Backup:  Name:    Type:  Capacity:       GB       GB  Number:  Encrypted data storage  No encryption | |
| 2.6 Leading System or Leading Application[[1]](#footnote-1) | ERP System  SAP  Oracle  Sage    Groupware / E-Mail System  Lotus Notes (IBM)  MS-Exchange (Microsoft)  Groupwise (Novell) | |
| 2.7 Attached Systems or Applications[[2]](#footnote-2) |  | |
| 2.8 User Management | by source system  cross-application (e.g. via LDAP)  other  Number of Users: | |
| 2.9 Remarks |  | |
|  | | |
| **3 New System (Target System)** | | |
| 3.1 Target System (Data Management / Document Management) | Name:  Version: | |
| 3.2 Operating System | Name:  Version: | |
| 3.3 Database | Name:  Version: | |
| 3.4 Storage System or Software | Name:  Version: | |
| 3.5 Storage Medium or Media | Primary: Backup:  Name:  Type:  Capacity:       GB       GB  Number: | |
| 3.6 Leading System or Leading Application[[3]](#footnote-3) |  | |
| 3.7 Attached Systems or Applications[[4]](#footnote-4) |  | |
| 3.8 User Management | by target system  cross-application (e.g. via LDAP)  other  Number of Users: | |
| 3.9 Remarks |  | |
|  | | |
| **4 Documents (Object Data) to be Migrated** | | |
| 4.1 Total Amount of Data | | GB |
| 4.2 Volume Growth | | GB  per day /  per month /  per year |
| 4.3 Number of Documents | | (Image Documents[[5]](#footnote-5):      ) |
| 4.4 Number of Pages or Object Files | | (Image Document Pages:      ) |
| 4.5 Documents Increase | | Number of Documents:  Number of Files:  per day /  per month /  per year |
| 4.6 File Formats | | TIFF  PDF  PDF/A  JPEG  BMP  MS-Office (DOC, XLS, PPT, etc.)  Text (COLD)  MSG  PST (MS-Exchange)  CAD-Files  XML  MO:DCA  AFP  PCL  PS  ALF  OTF  REO |
| 4.7 Number of Notes | |  |
| 4.8 Number and Types of Graphical Annotations | | text fields  stamps  marker  lines / arrows  freehand  other |
| 4.9 Number of Overlays | |  |
| 4.10 Remarks | |  |
|  | | |
| **5 Database Content (Metadata) to be Migrated** | | |
| 5.1 Database Model | | relational  hierarchical  object-oriented  object-relational  network model |
| 5.2 Number of Database Entries | |  |
| 5.3 Number of Relevant Tables | |  |
| 5.4 Total Number of Attributes / Index Fields | |  |
| 5.5 Total Number of Relevant System Field[[6]](#footnote-6) | |  |
| 5.6 Number of Data Subsets[[7]](#footnote-7) | |  |
| 5.7 Number of Document Types[[8]](#footnote-8) | |  |
| 5.8 Special Features | | multi-value fields  cross-references with …  1-to-1 links  1-to-n links  n-to-m links  folder structures |
| 5.9 Remarks | |  |
|  | | |
| **6 Processing of Object Data** | | |
| 6.2 No transfer (export, processing and import) of object data? | | no existing object data (documents, vouchers, etc.)  usage of a storage connector after migration[[9]](#footnote-9)…  without validation of object data during migration  with validation of object data during migration |
| 6.2 Single-Page / Multi-Page Conversion | | single-page 🡪 multi-page  multi-page 🡪 single-page  Type of Affected Documents:  Number of Affected Documents: |
| 6.3 Format Conversions | | no conversions  TIFF 🡪 PDF or PDF/A  ⮱ Number of Documents:  PDF 🡪 PDF/A  ⮱ Number of Documents:  Text 🡪 TIFF  ⮱ Number of Documents:  Text 🡪 PDF or PDF/A  ⮱ Number of Documents:  COLD (+ Overlay) 🡪 TIFF  ⮱ Number of Documents:  COLD (+ Overlay) 🡪 PDF or PDF/A  ⮱ Number of Documents:        🡪  ⮱ Number of Documents:        🡪  ⮱ Number of Documents:        🡪  ⮱ Number of Documents: |
| 6.4 Improving Image Compression | | YES  NO  Type of Affected Documents:  Number of Affected Documents: |
| 6.5 OCR: Full Text Recognition | | YES  NO  Type of Affected Documents:  Number of Affected Documents: |
| 6.6 OCR: Metadata Extraction | | YES  NO  Type of Affected Documents:  Number of Affected Documents: |
| 6.7 Transfer of Notes | | transformation into notes of target system  transfer into database of target system  transformation to an additional document page |
| 6.8 Type of Notes Transfer | | transformation into notes of target system  transfer into database of target system  transformation to an additional document page |
| 6.9 Transfer of Graphical Annotations | | no transfer of annotations  transfer of only certain annotations  ⮱ Type(s) of Annotations to be Transferred:  transfer of all annotations |
| 6.10 Type of Annotations Transfer | | transformation into annotations of target system  merging with document to new image document |
| 6.11 Remarks | |  |
|  | | |
| **7 Processing of Metadata** | | |
| 7.1 Validity Checks | | YES  NO  If Yes Please Specify: |
| 7.2 Metadata Transformations | | one-to-one transfer[[10]](#footnote-10)  ⮱ Number of Affected Entries:  formatting[[11]](#footnote-11)  ⮱ Number of Affected Entries:  transposing[[12]](#footnote-12)  ⮱ Number of Affected Entries:  supplementation[[13]](#footnote-13)  ⮱ Number of Affected Entries:  enrichment[[14]](#footnote-14)  ⮱ Number of Affected Entries:  merging[[15]](#footnote-15)  ⮱ Number of Affected Entries:    ⮱ Number of Affected Entries: |
| 7.3 Cleanup of Dataset | | YES  NO  If Yes Please Specify: |
| 7.4 Restructuring of Dataset | | YES  NO  If Yes Please Specify: |
| 7.5 Transfer of User Permissions | | irrelevant for migration  transfer to target system without changes  transfer with transformation(s)  ⮱ Type of Transformation(s): |
| 7.6 Remarks | |  |
|  | | |

|  |  |
| --- | --- |
| **8 Project Planning** | |
| 8.1 Place of Migration | HAVI, Hamburg  Data transport will be organized by HAVI[[16]](#footnote-16).  Data transport will be organized by customer.  at customer’s premises[[17]](#footnote-17)  with the possibility of remote control  without the possibility of remote control  decision pending |
| 8.2 Data Import into Target System | execution and control of import by HAVI  realization of an import process by HAVI using  existing import tool or service of target system  an HAVI-tool (based on api of target system) |
| 8.3 Strategy for System Change | single-level change[[18]](#footnote-18)  multi-level change[[19]](#footnote-19)  long-term change[[20]](#footnote-20) |
| 8.4 Delta Migration(s) | no delta because dataset is not growing and not changing anymore  no delta because of parallel operation  Yes, consideration of data modifications is not needed because changes are not possible (during ongoing migration)[[21]](#footnote-21).  Yes, but modifications of previously migrated data are possible and have to be considered:  modifications of documents / objects / files  modifications of metadata  modifications of notes / annotations |
| 8.5 Optional Limitations of HAVI’s Services | no creation of migration concept by HAVI  no HAVI hardware in case of on-site migration[[22]](#footnote-22)  no data export from source system needed |
| 8.6 Schedule | Intended Start of Project:  Intended End of Project: |
| 8.7 Remarks |  |

1. If system specified in 2.1 is not the leading one. [↑](#footnote-ref-1)
2. Please specify all systems (e.g. ERP, Groupware, etc.) and applications (incl. house developments) which deliver data to the system specified in 2.1. [↑](#footnote-ref-2)
3. If system specified in 3.1 is not the leading one. [↑](#footnote-ref-3)
4. Please specify all systems (e.g. ERP, Groupware, etc.) and applications (incl. house developments) which deliver data to the new system specified in 3.1. [↑](#footnote-ref-4)
5. Image documents (\*.tif, \*.jpg, \*.bmp, …) are usually scanned documents. [↑](#footnote-ref-5)
6. Relevant system fields are for example document-ID, archiving date, retention date, creation date, entry date, etc. [↑](#footnote-ref-6)
7. Please specify here the number of data subsets (= data set divisions at highest level, e.g. sub-archives, pools, repositories, document classes, etc.) related to departments, to attached systems, to data sources and / or to business processes. [↑](#footnote-ref-7)
8. Please specify here the total number of all existing resp. of all defined document types which generally have differing index sets or search masks. [↑](#footnote-ref-8)
9. The object data remain unaltered in the storage of the source system. Read access to the target system is secured through a suitable storage connector from HAVI. [↑](#footnote-ref-9)
10. Source system data will be transferred without changes into target system. [↑](#footnote-ref-10)
11. Before importing into target system source system data will be formatted according to formatting rules. [↑](#footnote-ref-11)
12. Before importing into target system source system data will be replaced by other data (values) based on transposing information and rules. [↑](#footnote-ref-12)
13. In case of missing or invalid source system data correct data will be determined using corresponding transformation information and rules and will be added in target system. [↑](#footnote-ref-13)
14. New data will be generated based on source system data and corresponding transformation information and rules. [↑](#footnote-ref-14)
15. Before importing into target system different data of source system will be merged according to defined rules. [↑](#footnote-ref-15)
16. Data transfer will be encrypted without exceptions; no use of special safety couriers. [↑](#footnote-ref-16)
17. Check if privacy policy reasons require an on-site migration. [↑](#footnote-ref-17)
18. One cutover for the entire dataset without parallel operation of source system and target system. [↑](#footnote-ref-18)
19. Several cutovers for individual certain parts of dataset without parallel operation of source system and target system. [↑](#footnote-ref-19)
20. Parallel operation of source system and target system over a longer period. [↑](#footnote-ref-20)
21. Delta data consists entirely of newly stored objects and associated new metadata. [↑](#footnote-ref-21)
22. Hardware for migration system has to be provided by customer. [↑](#footnote-ref-22)