# Questionnaire Data Migration

Date:

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

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| --- |
| **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       GBNumber:            [ ]  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)[ ]  otherNumber 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       GBNumber:             |
| 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)[ ]  otherNumber 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-pageType 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 |       |
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| **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)