Analysis Plan for Migration of eDOCS DM 10 on CDB Server to eDOCS DM 22.1 on ELO Server

Task 4.5.2.1

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1 Introduction and Objectives

This analysis plan guides the programmatic decision of the upgrade and migration of the WIPP Records Database which is used as a tool by the records center staff to maintain metadata, find records located on shelves in the records center, and find records located in boxes with a barcode at the dual storage facility.

eDOCS DM 10 is currently located on CDB which is a Dell PowerEdge R620 server running Windows 2012 R2 and SQL Server 2012.

The objective of the upgrade is to go from eDOCS DM 10 to eDOCS DM 22.1. The objective of the migration is to install the new eDOCS DM 22.1 on a new Dell PowerEdge R730 server, ELO, running Windows 2019 and SQL Server 2019. The SQL database will host the upgraded libraries in a staged environment parallel to the existing production system. There are three (3) workstations that will host DM Extensions without application integration.

2 Approach

Prior to an Open Text Consultant remote assistance session, the following will be performed by John Geilow:

- Backup current databases.
- Install Windows 2019 and SQL Server 2019 on the ELO server per the hardware specifications in the eDOCS DM 22.1 release notes.
- Download eDOCS DM 22.1 installation files and latest patches.
- Install the full Microsoft .NET Framework v4.8 with the latest update.
- Enable IIS Service Role with the ASP feature installed.
- Collect the DM Licenses and key codes for the installation of eDOCS DM 22.1.
- Attain a domain account that will be used for the running of eDOCS DM 22.1.
- Setup a desktop for testing eDOCS DM 22.1 after the migration.

The Open Text Consultant will remotely perform the following:

- Install eDOCS DM 16.7 Classic Web Server.
- Install eDOCS DM 22.1.
- Create DM server accounts.
- Create DM users on ELO server.
- Migrate databases from CDB to ELO.

After installation:

- Functional testing will be done by Grace Duran to ensure accessibility of the databases, which will include profiles being created and searches being performed.
• John Geilow will perform a SQL query in the old eDOCS databases of all tables. A screenshot of queries will be captured to verify how many rows are in each table. John Geilow will perform another SQL queries in the new eDOCS of all tables. He will also capture a screenshot of queries to verify how many rows are in each table. These will then be compared to the first set of queries to ensure that the row numbers match.
• Testing will be considered complete when queries to verify number of rows in each table are equivalent.

Upon completion of testing John Geilow will:
• Disable existing eDOCS and server.

3 Software List

The software to be used is SQL Server 2019 and eDOCS DM 22.1.

4 Tasks

There are five main tasks for this analysis plan; in which, John Geilow will complete Tasks 1 through 4 and Grace Duran and John Geilow will complete Task 5.

Task 1: Prepare new server for software installation and migration of databases. Completion date will be September 30, 2022.

Task 2: Install eDOCS DM 22.1 and migrate databases. Completion date will be September 30, 2022.

Task 3: Test eDOCS DM 22.1. Completion date will be September 30, 2022.

Task 4: Disable old eDOCS and server. Completion date will be September 30, 2022.

Task 5: Write Analysis Report documenting all tasks. Completion date will be October 30, 2022.

5 Special Considerations

No special considerations are needed.

6 Applicable Procedures

The migration of the software and its validation will be conducted according to NP 9-1, Analyses (Nielsen, 2020).
7 References

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