

Micro Focus SaaS

Project and Portfolio Management

**Migration Questionnaire - Customer On-Boarding**

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**Instructions**

This document is meant for customers migrating from an on-premises PPM deployment to a *Micro Focus* SaaS-hosted deployment. Please complete and return as much of the information below as possible.

The detailed answers provided by you will allow *Micro Focus* SaaS to determine areas of risk and how they can be mitigated. Based on the follow-up analysis performed by the Micro Focus SaaS engineers, an existing solution may need to be modified in accordance with *Micro Focus* SaaS PPM Best Practice guidelines in order to provide a stable, supportable, and manageable PPM environment for our customers.

If you are unsure of what is being requested, please write down your uncertainty as your answer and we will follow up with a clarification.

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| **Standard Details** |
| **Customer Name & Location.** |
| **Contact Details (Name and contact information for typical roles: Project Sponsor, Project Manager, Subject Matter Expert, and PPM Administrator).** |
| **What is your current PPM version?** |
| **What is your current PPM Service Pack?** |
| **What are your current operating system and database versions?** |
| **Please provide a list of environments (Dev/Test/Prod, etc.).** |
| **Number of users – Enabled and Total.** |
| **Are there any one-off patches/hotfixes applied to your environment? If yes, please provide details.**  You can execute *kDeploy.sh –l* to get a list of hotfixes if you are on a PPM version that has this feature. |
| **Please list the PPM Modules that you currently are using and how many licenses you have for each module.** |
| **Geography of the current user base.** |
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| **Can you confirm with your IT Security team that the following ports are allowed for PPM URL and workbench to open with your network? These ports are:**   * **HTTPS=443** * **RMIS = 1200, 1201 (additional incremental ports for large environments would be communicated once a sizing is completed and these 2 would be for a standard SaaS PPM environment) for the workbench** * **To Access Development Server (Optional) = 3389** * **MSP Plug-in (requires one-time Windows Admin access to install). This is configured from MPP -> Micro Focus PPM Center –> User Preferences - > Proxy Settings > Import & Export Proxy Settings / Internet Explorer Settings.** |
| **Please specify remote administrator access to production systems.** |
| **Please provide the PPM server status report and server logon report during a couple of peak usage times.** |
| **Are you currently using any PPM deployment management processes other than migrations?** |
| **Have you deployed any release management processes in PPM?** |
| **Advanced Details** |
| **Please provide the JVM heap size for each PPM node.** |
| **Please provide the production schema size.** |
| **For PPM objects that utilize SQL, have the SQL statements been optimized/tuned?** |
| **Is PPM integrated with LDAP? If yes, please provide details.** |
| **Is your PPM integrated with Documentum or DMS? If yes, please provide details.** |
| **Do you currently have any DB links or ODBC connectivity to the production schema?** |
| **Do you use any third-party reporting tools to generate reports from your PPM Production instance? If yes, please provide details.** |
| **Do you have any direct access to the production PPM schema from other applications? If yes, please provide details.** |
| **Do you currently use RML? If yes, please provide details.** |

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| **Do you currently use web services? If yes, please provide details.** |
| **Do you currently have any flat file integrations with PPM? If yes, please provide details.** |
| **Please provide the details of any other integrations.** |
| **Do you currently have any Oracle batch jobs running on the PPM database?** |
| **Do you currently use any command line batch jobs/shell scripts?** |
| **Do you have any additional custom schemas in the same DB that are integrated with PPM? If yes, please provide details.** |
| **Please provide a list of important PPM processes and functionalities.** |
| **Do you currently have any performance and other issues with the PPM tool? Please provide the current IT ticket volume for PPM support/maintenance.** |
| **Your Future Plans for PPM** |
| **Please provide details about any future PPM developments that are being planned.** |
| **Please provide details about the projected future usage of the PPM tool.** |
| **Supporting Information Requests** |
| **Please provide a copy of the server.conf file from your production environment (Copy and paste or embed the file).** |
| **Please provide the number of projects, requests, time sheets, etc. in your current implementation (PPM upgrade advisor report).** |
| **Do you have any documentation for custom objects (tables, views, packages, procedures, and functions)? If yes, please enclose/embed/share them.** |
| **Please include a list of invalid objects in the current PPM schema (select \* from knta\_invalid\_objects\_v). Copy and paste it here:** |
| **Do you have any existing documentation for current processes? If yes, please enclose/embed/share them.** |