April 2024

FAQ: Laserfiche Cloud Migration Readiness Assessment Tool

1. What is the Laserfiche Cloud Migration Readiness Assessment Tool?

The Laserfiche Cloud Migration Readiness Assessment Tool (fka "Assessment Tool") automates the analysis of self-hosted Workflow and Forms resources on your Laserfiche self-hosted system. This analysis sets the stage for successful planning and execution of a migration project.

A typical Laserfiche migration project begins with a comprehensive system audit, analyzing every facet of a customer's self-hosted implementation before mapping out the move to Cloud. Traditionally, audits are almost entirely manual, requiring significant time and effort that inflate the overall project cost. Both customers and Solution Providers have shared feedback that auditing Workflow and Forms resources is one of the most effortful steps in migration planning. We hope that the Assessment Tool resolves this pain point.

2. What is assessed by the tool?

The tool assesses Laserfiche Cloud support for features, functionality, and resources utilized in your self-hosted processes, as well as system limits. It also includes general usage data for added context in the report.

To evaluate feature and functional parity, the tool assesses Workflow/Forms process definitions (activities), plus everything those processes interact with: attachments; data sources; email servers; holidays; templates; error handlers; trustee directories; web services; X509 certificates; rules; custom reports; teams, and so on. To identify potential system limit considerations, the tool reviews available instance data (which activities ran, how many times, etc.) and compares it to current Cloud system limits. All of these findings are categorized according to the expected impact on a migration (ready to migrate, requiring review, requiring redesign, or unsupported).

For general usage insights, the tool also includes the available reporting data in the database to indicate how many times a Workflow or Forms process has run, and how recently. This data can be used to determine which resources are the highest priorities for a migration and which can be decommissioned.

3. What is NOT assessed?

Business data submitted, retrieved, or otherwise manipulated by a Workflow or Forms process remains private and will not be included in an assessment.

Other Laserfiche components or external integrations are not in scope for assessment at this time.

4. What are the prerequisites for using the tool?

The tool will accurately assess Workflow versions 9.2.1 and up, and Forms versions 10.4 and up. (Future updates to the tool may include support for older versions of Forms.)

5. Does running the tool affect my Workflow or Forms databases?

No. The tool is read-only and cannot edit or modify your database contents in any way.

6. What does the tool tell me about my migration readiness?

- **All Workflow and Forms items assessed by the tool are assigned a status according to their readiness for migration to Laserfiche Cloud:** Ready for Laserfiche Cloud; May Need Review; Requires Redesign; and Not Supported. Each individual Workflow or Forms process is also assigned a status based on the assessment of its components. Visualizations at the top of the report provide a summary of the tool's findings, while the interactive table below enumerates all issue details and includes links to supporting documentation.

- **Ready for Laserfiche Cloud (Green):** The item, Workflow, or Forms process is ready to be migrated or rebuilt in Laserfiche Cloud as-is. It does not require changes to use successfully to Laserfiche Cloud.

- **May Need Review (Yellow):** The item, Workflow, or Forms process needs to be reviewed to ensure it works as expected in Laserfiche Cloud. This indicates a small difference between the self-hosted and Cloud resource that should not impede general functionality. Items might need minor updates to ensure a successful migration, require minor changes when rebuilt in Laserfiche Cloud, or need to be reviewed after migration to ensure they are running as expected in Laserfiche Cloud.

- **Requires Redesign (Orange):** The item, Workflow, or Forms process needs to be redesigned in Laserfiche Cloud or will require a workaround. For example, a self-hosted Workflow activity may need to be replaced with a similar Laserfiche Cloud activity when rebuilding the Workflow in the Cloud environment.

- **Not Supported (Red):** Unsupported items and activities have no equivalent in Laserfiche Cloud. This status may indicate a temporary feature gap, such as multi-repository support, or a feature or functionality that is unsupported with no plans for an equivalent. Unsupported items will not

necessarily prevent a migration, but they should be evaluated early on to determine whether any specific issue impacts Cloud's suitability for your Laserfiche implementation.

- **Excluded (Black):** Items, Workflows, or Forms processes will only appear as excluded if they are manually de-selected from the report table and the report is reassessed. To re-include, simply re-select the appropriate row in the report table and run a reassessment.

7. What can I do to reduce the number of issues identified in the report?

It's normal to see multiple issues identified in an assessment report, and the presence of these issues does not mean you cannot migrate to Laserfiche Cloud, or that Laserfiche Cloud is not a good fit for your system. The issues in the report help you to infer the effort associated with a migration project, and to quickly identify any considerations that should be addressed before you begin. Systems with unsupported items can often be migrated to Laserfiche Cloud successfully with proper planning, and Solution Providers are encouraged to consult with Laserfiche for hands-on guidance in making Cloud work for your needs.

Also, remember that not everything in your existing system may need to come to Cloud. As you plan your migration project, you can manually deselect any Workflows or Forms that you don't intend to migrate, and run a reassessment. This excludes those items from your report, so that only the issues relevant to your planned migration are listed.

Each issue identified in the report has supplemental documentation in the online Laserfiche Administration Guide (doc.laserfiche.com), including recommended workarounds or remediation suggestions. Be sure to click the hyperlinked issue codes in the report to review the available documentation. Most issues flagged in the assessment report will be addressed during migration (e.g. redesign), not before, so they will remain in the report.

8. Is my assessment data private?

Laserfiche does not view your reports or transmit data to any third parties when a report is run. Laserfiche also does not retrieve any identifying customer, user, or database information associated with use of the tool or a report's contents.

Laserfiche does compile statistical and other information related to the performance, operation and use of the Assessment Tool and utilizes results in aggregated form for security and operations management, to create statistical analyses, and for research and development purposes.

By agreeing to use and run the Assessment Tool, you or your Solution Provider agree to provide Laserfiche with this anonymized data.

9. Where can I go if I have feedback/improvement suggestions on the tool?

You can fill out our Cloud Migration Feedback Form, located here.