



## Migrating from On-Premise to Cloud Checklist

When migrating an existing Saleslogix customer from on-premise to Cloud, there are a number of critical steps that need to be performed. These steps are very key to ensure that your customer's environment is set up for proper operation, such as backups, disaster recovery and optimal performance.

### Upgrade and Prepare for Migration

- Upgrade the customer to the latest released version (ex: 8.1) of SLX, including HF's
  - This can be done on-premise or using the cloud to perform this upgrade
- Run Integrity Check on the customer's database and fix any issues

### Transfer the Database and Attachment/Library Files

- Back up the database from the customer's on-premise environment or your local development environment
  - Restore the database on the cloud Database Server with the name "saleslogix" (all lower-case) to **E:\Database\saleslogix.mdf**.
- IMPORTANT: If the database is not named correctly and/or not located in the correct path, it will not be backed up!**
- Grant the **dbbackup** SQL user the "db\_backupoperator" and "public" roles on your restored SalesLogix database
  - Set the database to **Full Recovery Model** (under Properties > Options > Recovery Model)
  - Run the **sysdbafix\_script** located under **E:\Queries** against the Sage SalesLogix database
  - Back up and move the library and attachments files to D:\Filestore on the cloud server
  - Update attachment and library paths - map them to the Database Server's Filestore share. The correct paths are:
    - Sales Library: **D:\Filestore\SyncLogs\Library**
    - Attachments: **D:\Filestore\SyncLogs\Documents**

### Ensure Database and SpeedSearch Connections are Set Properly

- A default connection is set up using the name **SALESLOGIX**; this is a fixed alias, and should not be modified. You will need to update the PINGSERVER field in the sysdba.SystemInfo table to this alias (SALESLOGIX)
- Restart the Speedsearch service.
- Set all **Full** SpeedSearch indexes to run on Sunday at 3:00:00 AM
- Set all **Incremental** SpeedSearch indexes to run every 60 minutes between 5:00:00 AM and 2:00:00 PM

### Final Steps

- Update the web deployment configuration to do a File System deployment of all portals to the following path: **F:\inetpub\wwwroot**
- Update the Web Reporting URL in the Web Dependencies deployment section to point to the customer's cloud URL – ex: <https://customer.saleslogixcloud.com>
- Run the Roles Security batch file located in the c:\Program Files\SalesLogix directory
- Set all users to the Standard User Role in the Web Admin Roles section. Any users created in the LAN Administrator will not be assigned to the Standard User Role.
- If the customer is using external documents with SpeedSearch, those documents need to be copied to the Cloud servers and pointed to via Administrator
- Update Licenses – remove old licenses (disable users first) and apply the new licenses provided by Sage
- Make sure Debug=False in all web.config files before moving to Production
- IMPORTANT:** Make sure the Project is stored in the VFS of the database