



Migrating to SugarCloud

Technical Process Document

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This document is a technical resource for SugarCRM customers to reference when managing their migration to SugarCloud.

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1 Qualification

Objective: To help Sugar learn more about your environment and perform a preliminary assessment of your readiness to migrate to SugarCloud.

1.1 Pre-Qualification Form

Performed By: Customer

Complete the “[Pre-Migration Qualification](#)” questionnaire within 5 business days and return the completed questionnaire to your Customer Success Manager (CSM) and Partner.

If you have questions on any portion of the questionnaire, feel free to reach out to Sugar or your Partner for more details.

2 Pre-Migration Discovery

OBJECTIVE: The purpose of Pre-Migration Discovery is to 1) Identify the work needed and associated service cost for migrating the customer to SugarCloud, and 2) Identify any possible license subscription changes.

2.1 Discovery Consent

Performed By: Customer

Action: Agree to move forward with Discovery.

- If you are working with an authorised Sugar Partner, your Partner is most likely to manage Discovery.
- If you are not working with a Partner, you may request a quote from Sugar Care Services (SCS) to support your migration.

2.2 Raise Support Case

This step is the first of two support cases required for your SugarCloud migration. This first support case is specifically for managing the pre-migration discovery phase. A second case will be required for the actual migration. More details on this second support case are outlined in section 5.1.

2.2.1 Raise the Support Case for Discovery

Performed By: Customer, if no Partner is involved

If you agree to proceed with Discovery and have completed the “Pre-Migration Qualification” questionnaire:

- Raise a support case in the support portal:
 - Related to: “SugarCloud Request”
 - Category: "Migration Discovery Tools"
- Include the following details:
 - Support requirements identified during the Pre-Migration Discovery
 - Support with identifying non-cloud safe code, if any
 - Your timeline requirements
 - Any other business requirements

2.3 Scanning Tools

2.3.1 Scanning Tools Provision

Performed By: Sugar Cloud Support

A Sugar Cloud Support Coordinator will share Scanning Tools with you.

2.3.2 Scanning Tool Enablement

Performed By: Sugar Cloud Support

Sugar Cloud Support will provide any training and enablement with your team on how to properly use the Scanning Tools, as necessary.

2.4 Evaluation

2.4.1 Customization Evaluation

Performed By: Customer

Run the Scanning Tools on your environment to identify non-cloud safe functions (if any), incorporating the following into the evaluation:

- Customizations
- Integrations
- Workflows

You may request a quote from Sugar Care Services for any assistance with this stage.

You will need to verify that web service customizations conform to the guidelines outlined on the [Sugar Support Page](#).

2.4.2 Infrastructure Evaluation

Performed By: Customer

Evaluate your current infrastructure and share those details with Sugar or your Partner.

3 Pre-Migration Discovery Proposal

OBJECTIVE: To review the Migration Service Proposal with you and answer any questions.

3.1 Migration Service Proposal Review

Performed By: Sugar or Partner

Your CSM and/or Partner will review the Migration Service Proposal with you and discuss any additional options or considerations. The Migration Service Proposal will include:

- Changes to subscription costs (if any)

- SCS fees
- Additional storage over and above standard cloud allocation
- Overview of impact to converting existing workflows to SugarBPM's workflows

4 Migration Contract

OBJECTIVE: To formalize the agreement on the Migration Proposal with you and set a tentative schedule on when we will begin migration to SugarCloud. At this point, you should have everything you need to make a decision on migrating to SugarCloud.

4.1 Migration Agreement

Performed By: Customer

Action: Sign and return all relevant documentation and authorization forms supplied by Sugar or Partner.

4.2 Sign License Agreement

Performed By: Customer

Action: Review and agree to changes to your SugarCloud subscription costs, if any, and return to Sugar or Partner.

4.3 Sign Deployment Change Form

Performed By: Customer

Action: Review and sign the change of Deployment Contract Form and return to Sugar or Partner.

The Deployment Model Change Form is the direct contract between you and Sugar that authorizes moving your CRM environment from on-premises to on-demand (SugarCloud). You must sign this form before advancing to the next stage.

5 Cloud Readiness

5.1 Raise Cloud Migration Support Case

This step is the second of two support cases required for your migration. This second support case is specifically for managing your migration to SugarCloud. The first support case is outlined in more detail in section 2.2.

5.1.1 Raise the Cloud Migration Support Case

Performed By: Customer, if no Partner is involved

If you have agreed to proceed with migration and have signed the “Change of Deployment” form:

- Raise a support case:
 - Related to: “SugarCloud Request”
 - Category: “Migrate to SugarCloud”
- Include the following details:
 - Support with identifying non-cloud safe code (if any)
 - Timeline requirements
 - Any other business requirements

5.2 Cloud Support Instance Assessment

5.2.1 Create On-Demand Sandbox [Minimum/Customer Current Version]

Performed By: SugarCRM Cloud Support

Action Items: The next step in the migration is to stage the instance for import into SugarCloud. The Cloud Support team usually performs this step once a copy of the customers instance has been uploaded by the customer, Partner, or SCS.

5.2.2 Post-Migration/Upgrade Analysis

5.2.2.1 Communicate which Packages were not upgradable (uninstalled)

Performed By: SugarCRM Cloud Support

Action Item: Responding via the case, the Cloud Support team will provide a report of all the code or customizations that were removable (and removed) or prevented the instance from being imported into SugarCloud.

5.2.2.2 Review 1: Conduct and Report analysis of Table Data between On-Demand Test Sandbox and On-Premises Production Table Data

Performed By: SugarCRM Cloud Support

Action Item: Responding via the case, the Cloud Support team will provide a report of the disposition of the database, ensuring all tables and content provided were imported successfully.

5.3 Initial Test Import to CloudTest

The Initial Test Import to CloudTest phase accepts the import created in 6.2 and provides it to Operations for hosting in SugarCloud.

5.3.1 Upload to Operations for Import

Performed By: SugarCRM Cloud Support

Action Item: Cloud Support creates a backup of the instance uploads the files to the region-specific FTP server for Operations to Import

5.3.2 Release for Initial Test User Acceptance Testing

Performed By: SugarCRM Cloud Support

Action Item: The instance will be released for User Acceptance Testing.

6 Cloud Migration

6.1 Development Work Cloud Sandbox

This phase focuses on testing and revising customizations for the final migration to SugarCloud. These steps are recommended as 'best practice' based on previous migrations.

6.1.1 Duplicate Integrations for UAT Environment

6.1.1.1 Duplicate Integrations

Performed By: Customer, Partner, and/or SCS

Action Item: For testing purposes, existing integrations should be duplicated and pointed at the sandbox instance imported in 6.3. We recommend that integrations be run for a minimum of five consecutive days without human intervention.

6.1.2 Confirm Integrations running successfully

Performed By: Customer, Partner, and/or SCS

Action Item: Working against a test plan, the customer or Partner will verify that integrations are working as expected.

6.1.3 Custom Package Updates

The next two subsections are focused on updating any customizations to make them cloud-ready. This generally takes two forms:

- Updates to replace/reimplement disallowed or blacklisted functions
- Updates that make a package compatible with cloud performance limits.

The Partner, SCS (where contracted), and/or customer performs this step.

6.1.3.1 Placeholder for Package Updates

Performed By: Customer, Partner, and/or SCS

Action Item: Update and test custom packages.

6.1.3.2 Install Upgraded Packages

Performed By: Customer, Partner, and/or SCS

Action Item: Update and test custom packages.

6.1.4 Review system to confirm functionality

Performed By: Customer, Partner, and/or SCS

Action Item: Update and test custom packages

6.2 Client UAT Cloud Sandbox [Latest Version in Cloud]

The next two subsections relate to UAT testing in SugarCloud. It is highly recommended that testing at the following levels occur

User: Generally; one to two representatives of each user group/use case

Administrator: Managing customizations, schedulers, and users.

Integration: For data integrations, we recommend ensuring that integration run without unplanned human intervention for a MINIMUM of 5 consecutive days.

6.2.1 Follow UAT Plan from Pre-Migration Checklist

Performed By: Customer, Partner, and/or SCS

Action Item: Conduct tests as documented.

6.2.2 Client confirms all functionality is as expected on Cloud Sandbox [Latest Cloud Version]

Performed By: Customer, Partner, and/or SCS

Action Item: This is a sign-off step where all parties agree that the functionality works as expected.

6.3 Test Import Refresh for Customizations Testing

6.3.1 Open/Update Cloud Request with Operations

Performed By: SugarCRM Cloud Support

Action Item: An internal case is opened with Operations to schedule the import of the final test import. This request must be made 7 days in advance.

6.3.2 Create activity for Final Test Import on Cloud Support calendar in Outlook

Performed By: SugarCRM Cloud Support

Action Item: This is an internal scheduling step; marking the calendar to ensure all resources are available for import.

6.3.3 Create/Refresh Cloud Sandbox [Minimum/Customer Current Version]

Performed By: Cloud Support, Customer, Partner, and/or SCS

Action Item: The SugarCloud Sandbox is refreshed from a recent backup of the customers instance.

6.3.4 Post-Migration/Upgrade Analysis

The post-migration/upgrade analysis outlines the results of the import and notes any anomalies.

6.3.4.1 Communicate which Packages were not upgradable (uninstalled)

Performed By: SugarCRM Cloud Support

Action Item: Responding via the case, the Cloud Support team will provide a report of all the code or customizations that was removable (and removed) or prevented the instance from being imported into SugarCloud.

6.3.4.2 Review 2: Conduct and Report analysis of Table Data between On-Demand Test Sandbox and On-Premises Production Table Data

Performed By: SugarCRM Cloud Support

Action Item: Responding via the case, the Cloud Support team will provide a report of the database; ensuring all tables and content provided were imported successfully.

6.3.5 Customer/PS Updates Packages in Cloud UAT

Performed By: Customer, Partner, and/or SCS

Action Item: Any packages that require an update will be reinstalled after the instance is made available.

6.3.6 Follow UAT Plan from Pre-Migration Checklist

Performed By: Customer, Partner, and/or SCS

Action Item: Test as outlined in section 7.2

6.3.7 Client provides written confirmation all functionality is as expected on Cloud Sandbox [Latest Cloud Version]

Performed By: Customer

Action Item: Responding via the case or via email, the customer informs the project team that all functionality has been tested and working as expected in SugarCloud. This sign-off is required before any further migration work will be scheduled.

6.4 Final Test Import to Cloud

The Final Test Import is a dress rehearsal for Go-Live. The entire process is performed with as close to real-world conditions as possible in order to validate cutover procedures and timing. The final test import must be conducted a within 2 weeks prior to go-live and must contain ALL content migrating to SugarCloud.

This process is a more compressed version of sections 6.2, 6.3 and 7.3. We are leveraging all of the lessons learned in the last two imports and confirming that all the steps are valid and work as expected.

6.4.1 Test import containing FULL UPLOAD FOLDER and ALL data

Performed By: SugarCRM Cloud Support, Customer, Partner, and/or SCS

Action Item: See section 6.2, 6.3 and/or 7.3

6.4.2 Instance Estimated Size

Performed By: SugarCRM Cloud Support

Action Item: See section 6.2, 6.3 and/or 7.3

6.4.3 Verify Usage Designation – Sandbox for tests and Production for go-lives

Performed By: SugarCRM Cloud Support

Action Item: This internal action identifies the usage designation for a given instance. This is done primarily for documentation reasons.

6.4.4 Final Test User Acceptance Testing

Performed By: Customer, Partner, or SCS

Action Item: See section 7.3

6.4.5 Create Import Request for Go Live with 7-days notice

Performed By: SugarCRM Cloud Support

Action Item: Create an internal ticket for SugarCRM Operations to perform the import work. This ticket helps Operations identify resources for the selected go-live date and time.

6.4.6 Request update of license on go live date, if necessary

Performed By: SugarCRM Cloud Support

Action Item: If an edition/flavor change is part of the migration, Cloud Support will create an internal ticket for the Orders Desk to prepare a production license for go-live.

6.5 Pre Go-Live Planning

6.5.1 Resource Scheduling

Performed By: SugarCRM Cloud Support, customer, Partner, and/or SCS

Action Item: All teams verify that have the necessary people, processes and technical needs available on the day selected for go-live.

6.5.1.1 Client has confirmed date for Cloud Migration

Performed By: Customer, Partner, and/or SCS

Action Item: Customer provides written confirmation of the go-live date via the Case Portal.

6.5.1.2 Operations have confirmed they are set for Cloud Migration

Performed By: SugarCRM Operations

Action Item: Operations written confirmation of the go-live data via the Cloud .

6.5.1.3 PS/Client are scheduled for standby day system goes online.

Performed By: Customer, Partner, and/or SCS

Action Item: Customer and/or Partner schedules individuals needed for Go-live and ensures they will be standing by should any issues arise.

6.5.1.4 Determines Conditions and Decisions Makers for Roll Back if needed

Performed By: Customer, Partner, and/or SCS

Action Item: The customer and/or Partner agree on go/no go conditions as well as decision makers for go/no go. These individuals are added to the case if they are not added already so that they have full visibility of all communications.

6.5.2 Pre Cloud Migration (2 Days prior)

This section covers the last 2 days prior the migration. These steps confirm that resources are ready and that there are no blockers for the pending import.

6.5.2.1 Customer is emailed what to expect over course of Go Live and asked to confirm Go Live

Performed By: SugarCRM Cloud Support

Action Item: Sending messages via the case, Cloud Support will verify that go-live will occur on the scheduled date, all resources are available and everyone knows what tasks to perform.

6.5.2.2 Go-Live Reviewed at Weekly Ops/Cloud Support Meeting

Performed By: SugarCRM Cloud Support and Operations

Action Item: Cloud Support and Operations discuss the pending migration and ensure all preflight checks are completed and resourcing is ready for go-live day.

6.5.3 Day of Cloud Migration (Day before system is Live)

6.5.3.1 Client is emailed to confirm time of data cut-off

Performed By: SugarCRM Cloud Support

Action Item: Cloud Support will send a message via the case to confirm the time of the cutoff date, system outage.

6.5.3.2 Developer/PS Disables Integrations

Performed By: Customer, Partner, and/or SCS

Action Item: Any integrations that will run overnight or that would run during the cutover that can be disabled early are disabled by SCS/Customer/Partner.

6.5.3.3 Customer/PS Removes all problem Packages

Performed By: Customer, Partner, and/or SCS

Action Item: Any problematic packages that need to be uninstalled prior to cutoff are uninstalled and removed by SCS/Customer/Partner.

6.5.3.4 Customer/PS Updates Packages in Cloud UAT

Performed By: Customer, Partner, and/or SCS

Action Item: If not already completed, all packages are installed and verified functional in SugarCloud UAT environment.

6.5.4 Client provides written confirmation all functionality is as expected on Cloud Sandbox [Latest Cloud Version]

Performed By: Customer

Action Item: The customer provides written confirmation that the SugarCloud UAT environment is working as expected.

7 Go Live

7.1 Go Live Import to Cloud

These final steps cover the final effort/push for go-live

7.1.1 Go-Live Checklist

Performed By: Customer, Partner, and/or SCS

Action Item: Perform go-live checklist against on-prem instance:

- Disable all integrations
- Disable Sugar Schedulers
- Verify packages uninstalled
- Backup instance and upload

7.1.2 Stage and Import Instance for Go-Live

Performed By: SugarCRM Cloud Support

Action Item: Using previously created staging checklist, Cloud Operations stages the instance for Operations.

7.1.3 Communicate which Packages were not upgradable (uninstalled)

Performed By: SugarCRM Cloud Support

Action Item: Cloud Support updates the case with the list of packages that needed to be removed for a successful import.

7.1.4 Review 3: Conduct and Report analysis of Table Data between On-Demand Test Sandbox and On-Premises Production Table Data

Performed By: SugarCRM Cloud Support

Action Item: Responding via the case, the Cloud Support team will provide a report of the database; ensuring all tables and content provided were imported successfully.

7.1.5 User Acceptance Testing

Performed By: Customer, Partner, and/or SCS

Action Item: Users log into the system and work through their test scripts to ensure all functionality is working as expected

7.1.6 Client provides written confirmation all functionality is as expected [Latest Cloud Version]

Performed By: Customer

Action Item: The customer provides written confirmation that the SugarCloud production environment is working as expected.

7.2 Post Go Live Support

Once the instance has migrated to SugarCloud, UAT has been completed and the customer has signed off on functionality, the project enters the Post Go-Live phase. Issues in this phase are raised via case with SugarCRM Support.

7.2.1 Post Go Live Support Issues

Performed By: Customer, Partner, SCS, and/or SugarCRM Support

Action Item: Any post-go live issues are handled via the Case Portal. Where needed, Cloud Support assists with open issues.

7.2.2 Delete or refresh any dev/test instances

Performed By: SugarCRM Cloud Support

Action Item: If agreed via the import case, Cloud Support updates or deletes any dev or test instances in SugarCloud.

7.3 Closing

These final steps are handled by Cloud Support and represent clean-up tasks for actions taken during the import.

7.3.1 Close case

Performed By: SugarCRM Cloud Support

Action Item: Case is set to 'Closed - Resolved'

7.3.2 Archive Project

Performed By: SugarCRM Cloud Support

Action Item: The Teamwork project is archived.

8 Additional Resources

[SugarCloud Migration Guide](#)

[SugarCloud Disk Space Limits](#)

[SugarCloud Policy Guide](#)