

Deltek Cloud Onboarding Checker

User Guide

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Introduction

The Deltek Cloud Onboarding Checker (COC) is a tool that on premise clients will execute to validate their database prior to uploading a copy to the Deltek Cloud. The tool encompasses various checks that a client's database must pass in order to be deemed suitable for provisioning in the Deltek Cloud. Executing this tool will be a mandatory prerequisite.

How it works?

A customer will download the Deltek COC tool from DSM. The tool will validate one schema at a time.

A client will have the option to execute the tool from the database server or any client machine that can connect to the database server. An internet connection to DSM will be required for the tool to download files at runtime.

The process of checking a customer's database is broken up into two parts

1. Gathering relevant data from a customer's database
2. Validating this data against a dynamic list of requirements obtained through DSM

Upon execution, the Deltek COC tool will connect to the internet to download a file from DSM. This file will contain the following information:

- Database properties that are supported by the Deltek Cloud. Some examples include:
 - SQL Server Version
 - Limits on Database Size
 - Supported Collation
 - Other features like Compression or Encryption
- Current set of database patches applied to the cloud environment
- Other environmental details supported by the Deltek Cloud

The first step gathers information from the customer's database and inserts rows into a table created by the tool. Next, the downloaded file has a list of values that are loaded into the database and then compared against those from the customer's database. If the customer's database passes all the checks, an option to backup the database is provided to the customer. If selected, a backup file will be created in the designated folder on the database server.

To migrate to the Deltek cloud, a customer must meet all the requirements.

Requirements:

The Deltek COC tool currently supports onboarding of databases for the following products and versions

- Costpoint 7.1.1
- Time and Expense 10.0
- Budgeting and Planning 7.0

Any other products and released versions are currently out of scope.

Certain special characters in names and passwords will be supported. This list is similar to those supported by the database tier installers of these products.

An internet connection from the host machine to DSM is required for the tool to download files at runtime. Customers have the option to execute the tool from any machine that connects to their database server.

The installer requires the .NET Framework and SQL Client libraries (SQLCMD) to run.

The Deltek COC tool will collect the following information from a user

- 1) Host Name (Database Server)
- 2) SQL Instance Name
- 3) Port
- 4) User Name
- 5) Password
- 6) Schema Name
- 7) Sysadmin User
- 8) Sysadmin User Password
- 9) Application Name
- 10) Product Offering
- 11) Backup Location

In order to be eligible to migrate to the Deltek Cloud, every database and schema must pass all the following checks:

- **CHECK 1: APPLICATION VERSION**
 - Checks table DB_TABLE_VERS for product and version
 - Currently supporting Costpoint 7.1.1, Budgeting and Planning 7.0, Time and Expense 10.0
 - Anything outside of these products and versions will fail the check.
 - On failure, the tool will stop and return an error message to the user
 - Customer must upgrade their database to the supported product version in the cloud

- **CHECK 2: DATABASE VERSION**

- Checks the Microsoft SQL Server version of the customers database
- Currently supporting SQL Server 2008 and later versions
- Versions older than SQL Server 2008 are not supported
- On failure, the tool will continue on to the next check
- Customer must upgrade to a supported version. The Deltek Schema Migration Tool may be used to migrate their database to a supported version of SQL Server.

- **CHECK 3: DATABASE SIZE**

- Checks the size of the customer database
- Currently allowing databases under 50GB (including data files and log files)
- Anything above 50GB will fail the check
- On failure, the tool will continue on to the next check
- Customer must contact Deltek customer care for next steps

- **CHECK 4: DATABASE ENCRYPTION STATUS**

- Checks the encryption status of the customer database
- The customer database should not be encrypted
- An encrypted database at any level will fail the check
- On failure, the tool will continue on to the next check
- Customer must decrypt any encrypted data in their database

- **CHECK 5: DATABASE COLLATION**

- Checks the collation of the database
- Collation must be at Latin1_General_Bin
- Customers on the SQL Server default collation SQL_Latin1_General_CP1_CI_AS or collation SQL_Latin1_General_CP850_BIN will fail the check
- On failure, the tool will continue on to the next check
- Customer must download the Deltek Collation Conversion tool to convert the database collation to Latin1_General_Bin

- **CHECK 6: COLUMNS WITH INCORRECT COLLATION**

- Identifies any columns of datatype text, char or varchar that may have a different collation from the database
- Collation must be at Latin1_General_Bin for all text, char and varchar columns
- Any columns of datatype text, char or varchar on a different collation will fail the check
- On failure, the tool will continue on to the next check
- Customer must download the Deltek Collation Conversion tool to convert the database collation to Latin1_General_Bin

- **CHECK 7: COMPRESSED TABLES**
 - Identify any tables in the customer's database that may be compressed
 - All tables must be in an un-compressed format
 - Any tables found to be compressed will fail this check
 - On failure, the tool will continue on to the next check
 - Customer must take steps to un-compress all tables in the database
- **CHECK 8: COMPRESSED INDEXES**
 - Identify any indexes in the customer's database that may be compressed
 - All indexes must be in an un-compressed format
 - Any indexes found to be compressed will fail this check
 - On failure, the tool will continue on to the next check
 - Customer must take steps to un-compress all indexes in the database
- **CHECK 9: MAXIMUM PATCH LEVEL**
 - Identify the highest patch applied to the customer's database
 - This patch number should match the corresponding value from Deltek Cloud
 - If patch number does not match, the customer's database will fail this check.
 - On failure, the tool will continue on to the next check
 - Customer must take steps to apply missing hotfixes or contact Deltek Customer Care
- **CHECK 10: PATCH LIST DIFFERENCES**
 - Identify all the patches applied to the customer's database and validate against those applied to the Deltek Cloud
 - The patch list from DB_TABLE_VERS must match the list from DSM
 - Missing or extra patches applied to the customers database will fail this check
 - On failure, the tool will continue on to the next check
 - Customer must take steps to apply missing hotfixes or contact Deltek Customer Care
- **CHECK 11: CREDIT CARD INFORMATION**
 - Identify if any credit card information resides in the customer's database. This check pertains only to Time and Expense customer's
 - Credit card information should not be present in the customer's database
 - If credit card information is found, then the customer's database will fail this check
 - On failure, the tool will continue on to the next check
 - Customer must update the relevant columns to null or contact Deltek customer care for further help

- **CHECK 12: ADDITIONAL SCHEMAS WITH OWNED OBJECTS**
 - Identify if any other schemas reside in the database other than the schema being checked
 - Only one user and schema is allowed per database.
 - Having more than one user and schema in a database will fail this check
 - On failure, the tool will continue on to the next check
 - Customer must download the Schema Migration Tool to migrate other users and schemas to a separate database
 - Link users and corresponding schemas should be dropped from Costpoint databases

- **CHECK 13: DBCC CONSTRAINT CHECK**
 - DBCC CHECKCONSTRAINTS will be executed over the database
 - No error should be returned after running this check
 - Any failures due to constraint violations will fail this check
 - On failure, the tool will continue on to the next step
 - Customer is responsible to fix any reported constraint violations

Backup Process:

The Deltek COC tool allows a customer to optionally create a database backup upon successful validation of all checks. **The database backup file is always created on the database server.** If the COC tool is executed from a remote server or a client machine, the customer must provide a valid folder on the database server for the backup file.

The screenshot shows the 'Deltek Cloud Onboarding Checker - 1.0.0' window. The title bar is blue with the Deltek logo and tagline 'Know more. Do more.™'. The main window has a blue header with the text 'Database Backup' and 'Enter the database backup information below'. Below the header, there is a section titled 'Backup Information' with a checkbox labeled 'Perform Database Backup upon successful validation' which is checked. Underneath, it asks 'The database is located on:' with two radio button options: 'Local Machine (ASHDBT24)' (selected) and 'Remote Server (ASHDBT24)'. Below that, it asks 'Backup folder location (Please choose an existing directory):' and shows the path 'C:\Deltek\CloudOnboardingChecker\Backup' with a 'Change...' button. At the bottom of the section, it states 'Backup file will be generated on the database server'. The window has a standard Windows interface with minimize, maximize, and close buttons in the title bar, and 'Back', 'Next >', and 'Cancel' buttons at the bottom.