MIGRATING FROM JIVE TO CONNECTIONS CLOUD

IBM Customer Success Cloud Onboarding

Abstract
Quick start guide to the pre-requisites, planning needs and key steps to migrate user data from Jive to IBM Connections Cloud.

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Pre-requisites for migrating users and data to Connections Cloud

This document provides information on the pre-requisites and steps to migrate data from third party collaboration environment, such as Jive, to Connections Cloud. It is not intended as a replacement for the service documentation, and contains links to relevant parts of the documentation for complete details. The process described is based on the use of a proprietary tool, and the associated services, from an IBM business partner. This tool & process cannot be run by a customer alone, without a services contract.

Every project will be slightly different. Notably the project team – IBM Services, IBM Business Partners, and your own staff – will have an agreed set of responsibilities, which may differ from what is stated or implied here. Use this as a guide to ensure that all the necessary steps, including opening the Support tickets (PMRs), have clearly defined owners in your project plan.

This document is intended to apply to a variety of client migration/onboarding scenarios. Some clients will be moving only collaboration content, some will be moving or adopting the available integrated cloud email services. Clients will have different types of subscriptions, some of which can create unique considerations. If a section of this document doesn’t appear to apply to your migration, it probably doesn’t, and can safely be ignored.

The Migration Process – Overview

The following is a generic overview of the typical phases. Additional elements, such as user or administrator training, may also be planned. Specific details around schedules, areas of responsibility and timing will be project specific. Large, or otherwise complex migrations, may require additional work

Note: each project will be detailed in a Statement of Work agreed to before the project begins.

Source Content Analysis

- Review the existing Jive collaboration environment, interview the content owners and understand the source content history and structure. An initial content analysis will be done to determine the quantity and quality of the source content.
  - Fully understand the source content, structure, quantity and quality
  - Install migration server and database server for the source content analysis
  - Run content analysis tooling to capture content and analyze

Mapping & Transformation

- Define the source and target mapping of content between the source and target systems in order to design the migration process. The functional migration design will be created. The design will be an efficient, reusable implementation of the transformation rules required within the Content Migrator to meet the structure of the target Connections Cloud system.
  - Design the migration process; source and target content mapping.
  - Determine required content transformations and enhancements.
  - Target template design specifications.

Migration Tool Deployment & Configuration
Complete the installation, configuration and deployment of the needed server/workstation hardware/operating system required by the migration tools. The migration team will configure and customize the tools to deliver upon the requirements to migrate the selected source content. Validate the processes, procedures, communications plans and testing of the migration effort.

- Build the migration process.
- Build and test the transformation rules.
- Develop environment matching the configuration of the agreed target to allow test loads.
- Validate the Migration:
  - Iterative pilot migrations with refinements.
  - Quality assurance reviews.

### Live Migration

Recapture source content to ensure what’s being migrated is up to date; complete the data migration and cutover to the cloud system.

- Recapture source content.
- Run the validated migration process to transform, enhance and load source content into the target system.
- Inform users

### Key Pre-requisites

The following items or actions will be needed before the migration can begin, and are typically the responsibility of the customer team to complete. Each is discussed below in more detail.

- You will need to provide access to the Jive environment to the migration team.
- All users who have content that needs to migrate (including @mentions of them and comments they’ve made on other users’ content) must be provisioned and active in the cloud using the same email address as their current Jive account.
- You will need to create a migration account in Connections Cloud for the tool to use, it will need the User, Admin and AppDeveloper roles assigned.
- You will need to request that the “Impersonation API” is enabled for the organization.
- You will need to create (or identify an existing) “librarian” account for orphaned content.
- You will need Integration Server FTP access assigned to an account with Administrator Role in order to use it for bulk provisioning.

### Key Customer Tasks During the Project

While the migration itself will normally be conducted by a services team, the customer is responsible for several important tasks along the way. The migration team will need you to address and complete these tasks in a timely manner as they come up during the project.

- You will need to review the initial content audit reports and make decisions about what to do with content that does not have a clear migration path.
You may need to do some cleanup of content; notably that which doesn’t have a clear migration path, or is no longer needed. Reviewing the initial content audit will help you identify content that may no longer be needed.

You will need to compare data in Jive to that in Connections Cloud, during the migration testing phase, to validate that the agreed migration and transformations are correct, and provide approvals to proceed.

You will need to validate the data after migration is completed, and decide what should be done with any exceptions that may have come up.

What is Content “Without a Clear Migration Path”?

There are a variety of functional differences between Jive and Connections Cloud that will affect how content is migrated. Notably, there are features that exist in Jive that don’t have an exact parallel in Connections Cloud, or are organized differently – such blogs, wikis and forums only being available inside a Community App, rather than as personal objects, differences in the use of Rich Text and attachment, and so on. For objects like these, a decision will need to be made as to where to place them in Connections Cloud.

These options include:

- Merge with an existing community which will be migrated from the source.
- Migrate to a new community to be created during the migration.
- Transform into a different type of object.
- Rule the item out of scope for migration.

The migration team will provide detailed information on content mapping and transformation as part of the planning process, and engage in a detailed discussion around content mapping once the initial analysis is performed and it becomes clear what will be needed.

The other main form of content without a clear migration path is that owned by an account in Jive that will not have an active user in Connections Cloud; such as an account belonging to an employee who has left, but whose account was retained in order to preserve their content. This is often resolved by the use of the ‘Librarian’ account, if you wish to continue holding onto the content.

Source System: Providing Access to the Migration Team

The migration team needs an account that has the necessary access to read all content. For Jive the migration tools will require user ‘read’ access to all the in-scope content for migration. While admin access is not necessarily required it is recommended, as it avoids having to make changes if the need arises for any reason.

The migration tools do not perform any create/updates inside Jive; however, with admin access, its usually a single addition to the admin group (if using a new account) and this provides access to all content. If the supplied account only has read access it may require additional effort on the customer part if it turns out that the account does not have access to all content – and also creates the possibility for in scope content to be ‘missed’ during the capture and extract process because the account cannot see it.
Using the Integration Server to provision user accounts in the cloud

See also the document *Integration Server Essentials for Flexible Deployment* for more detailed information on using the Integration Server for user provisioning; especially if you are provisioning only the Connections/Social elements from a flexible activation part that includes cloud email subscription elements that you do not want to activate at this time.

The Integration Server (IS) accepts a set of CSV format files to bulk provision and manage user accounts. Additional actions available through the IS are described later in this document.

The account to be used for FTP access must be an active Connections Cloud account with Admin role. It does not need to have User role or any subscriptions. It can be useful to create a separate account for this purpose, if you intend to use it with scripted automation of future user management.

To enable get FTP access, open a Support ticket (PMR), as follows:

*Subject: Enable Integration Server FTP access*

*Please provide FTP access to the following account(s)*

email@yourcompany.com

*Company name:*

*Connections Cloud Customer ID:*

*Data Center:*

*Your contact information:*

The FTP server can be reached at:

ftp://ftp.XX.collabserv.com:990 replace XX with your cloud datacenter (na, ce, ap)

Use encryption: Implicit FTP over TLS

Log in with the user ID and password of the IBM Connections Cloud account for which Integration Server documentation can be found here:


Moving User Profile Pictures to the Cloud

Users may have profile pictures in the source system, or in a related company directory. The Integration Server uses CSV format files, which do not support image content. Connections Cloud has an API call that can be used to import images into the user profile, and TDI can be used to extract them from the existing environment. API’s are accessible to clients, and IBM Services has a tool set, using the API, that can perform this extract/import process for clients.

Related API documentation can be accessed here:

Creating/identifying a “Librarian” Account

All content migrated into Connections Cloud must be associated with an active user account. However, it may be the case that there are users who own content on the existing system who are no longer with the organization, and whose accounts have simply been preserved to maintain their contents. Since it’s unlikely that an organization will want to re-create the accounts of former employees, an account can be created (or designated, there may be one such account already) to act as a home for data which no longer has an individual owner. The migration process requires the identification of a default account to which it can assign any content that could not otherwise be migrated. In the absence of a dedicated librarian account, the migration account will be used. It is our recommended best practice that this account be clearly identified, and created if needed, in advance.

Having an account like this will also be useful over the long term. When users are deleted, it is possible to assign all of their content to one other user. However, it’s not always clear at the time a user is deleted to whom their content needs to be assigned. Similarly, there may be content that is company owned, and not necessarily associated with an individual. This account can be used for these purposes on an ongoing basis. This account requires user role and a Connections subscription.

For example, the account might be called something like:

Content Manager content.manager@example.com
Cloud Librarian cloud.library@example.com
<Company> Librarian acme.librarian@example.com

Creating the Migration Account

The data migration team will need an account in your cloud organization to push the data into the service. This account must have User, Admin and AppDeveloper roles, and the organization must have been granted the right to access the Impersonation API (see below). It can also be useful (but it is not required) for this account to have a Connections subscription, so that the migration consultant can use it to see content and verify test scripts without access to user accounts.

The migration account can be the same one used for the Librarian, above, but its “cleaner” to set up a separate, temporary, account to act as the migration account. Outside consultants, IBM Services or Business Partners will have access to the migration account credentials, while they do not require access to the librarian account. It will also allow the use of the migration account for migration testing, without causing confusion over what was test vs real data. Ideally the migration account can be completely deleted at the end of the project.

Requesting Impersonation API Access

Project Scheduling Note: This request must be executed during a maintenance window, and it may take several days to be completed. Make sure this request is made early in the project to avoid delays.
The organization needs to be granted special access to the Impersonation API. These are API calls not normally open to users, which allows content to be loaded into Connections Cloud under another account’s ID. Access is granted to the organization only for the duration of the migration, and should then be turned off. Please be sure to open a second PMR when the migration is completed to request that impersonation be turned off.

To make this request, open a support ticket (PMR), as follows:

Subject: Grant access to Connections Cloud* Impersonation API

Key Details: Company name & Connections Cloud Customer ID

And provide the following information in the email:

1. Number of users in the org that will be provisioned into Connections Cloud.
2. Amount of data for the organization (roughly)
3. Anticipated start date for migration, and if known, the planned duration of the migration.
4. Lab Services and/or T-Systems Project Manager contact information

The Connections Cloud Operations team requests the above detail so that it is aware of upcoming large data movements, and API use, so that it can anticipate needs and stresses in the service in advance, especially in the case of multiple concurrent large migration projects.

*It’s important to make sure that “Connections Cloud” is clearly mentioned in the service request (PMR), as that will help Support route the request to the correct team. Avoid any mention of terms such as: email, Verse, Notes, Domino, SmartCloud or SmartCloud Notes to minimize the chance of the PMR being routed incorrectly.

Connections Cloud User Account Activation

It is essential to ensure that the accounts for whom data will be migrated from the existing Jive environment get provisioned in Connections Cloud and activated before the migration is scheduled to start. Accounts that are not active cannot have content migrated into them; the API will not allow it.

Normal activation is done by users clicking on the activation link emailed to them when their account is created (provisioned). Clients who have enabled Federated Identity (using SAML) can force account to be activated at the time of provisioning without any user action.

Users who already have activated accounts do not need to do anything (e.g. if mail subscriptions were previously migrated to, or created in, the cloud). The Connections Cloud account only ever needs to be activated once, and no action on the user’s part needs to happen when new subscriptions are added later.

If you are not using Federated Identity (SAML)

If Connections subscriptions are being provisioned without also activating an associated email subscription in the cloud, there is no way to prevent or defer the sending of the activation email.

It is an important part of project planning to be sure users are aware that this email will be sent to them, and to follow up and make sure users know when they should have received it, in case it gets delivered to spam folders, or deleted by those who do not recognize it. Users who do not have content to be migrated do not need to be provisioned or activated prior to migration.
If mail subscriptions are being activated at the same time, then users can be provisioned without receiving an activation email if an initial password is supplied during the provisioning process. Users will need to be contacted to provide them with that initial password. If mail was migrated from an existing on-premises Domino environment and/or a Domino hybrid environment has been established, there may be differences and other considerations that are beyond the scope of this document. Contact your IBM Cloud Onboarding Coordinator, IBM Technical Sales, or your IBM Business Partner for more information.

What is Force Activation?

Force Activation is a keyword that can be used in the Integration Sever provisioning file to activate all provisioned accounts without the user having to activate their accounts through a first login. It is used in conjunction with the “SUPPRESS_ALL” keyword to prevent activation emails from being sent. Force Activation can only be used with clients using Federated ID for security reasons. It also requires that Email Verification has been turned off and that the email domain(s) used for the login IDs to be validated and whitelisted by the service in advance – something done as part of the Federation set up process.

If using Federated ID (SAML) for single sign on

For the FORCE_ACTIVATION keyword to work SAML, the Federation configuration must be complete and two sets of settings must be in place. If either is not set up, you will get an error when submitting the CSV file to the Integration Server that will say “user and/or customer does not meet required criteria” or “Invalid email domain provided” or similar.

1) Domain white list. There is no UI for this, you will need to ask Support to verify/add domains to the `customer_domains.json` file in BSS.

Note: This is not related to the synchronization of the global domain document in a Notes Hybrid configuration, nor the validation of a domain for email use.

Sample Support Request Ticket

Subject: add the following domains to the file `customer_domains.json` file in BSS

Please add the following domains to the file `customer_domains.json` file in BSS so we can use FORCE_ACTIVATION in the Integration Server. SAML configuration has been completed.

yourdomain.com
your_other_domain.com
etc. – listing all domains that may be used as login IDs.

Company name:
Connections Cloud Customer ID:

Project Scheduling Note: This request must be executed during a maintenance window, and it may take several days to a week, or more, to be completed. Make sure this request is made early in the project, but after SAML is configured, to avoid delays.
2) Email verification set to “disabled”. This can be seen in the Admin UI under “Organization Account Settings” only once the SAML configuration has been completed. Support or Client Services can change this setting for you.

If you see this:  

![Email Verification for New Users (Enabled)](image1)

You want it to be this:  

![Email Verification for New Users (Disabled)](image2)

Sample Support Request Ticket

**Subject:** please disable “Email Verification for New Users”

**Route to Client Services Group for action**

Please disable the “Email Verification for New Users” setting in Connections Cloud for our organization. SAML configuration has been completed, and we wish to use FORCE_ACTIVATION with suppressed welcome email when provisioning users through the Integration Server.

**Company name:**
**Connections Cloud Customer ID:**
**Data Center:**
**Your contact information:**

The above two requests are ultimately processed by different teams, so it is advisable to open two separate Support tickets so they can be routed individually.

Adding/Updating User Profile information

User Profiles

At the time of provisioning not all user information may be available, and user profiles change over time as well. Provisioning change file examples for many types of operations can be found here:


Some user information can only be added (or modified) using a *User Profile Attribute Change* file. This file has a different set of columns, and slightly different structure from the provisioning file. The file name structure is also different, and is of the format:

`customerId_department_PROFILES_seqNum.csv`

Where `customerId` is the same ID used in the provisioning file name.

`department:` is optional, like the Source ID in the provisioning file name.

`PROFILES:` is optional, like used as is.

And `seqNum` also follows the same pattern and purpose as above.
The User Profile Attribute Change file is fully described here:

The Organization Chart in Connections Cloud & IBM Verse

In Connections Cloud the Organization Chart widget will appear only if reporting structure data is available in the user profiles. The Org Chart data is also used, when available, by IBM Verse to analyze email for importance, and display related organization connections in the Verse UI. If you want to use, or currently use, this feature in Connections, then read the following. This is not required for the migration of data, and need not be used at all, but is part of setting up and using the full range of features in Connections Cloud.

In Connections Cloud the Org chart data is also loaded through the Integration Server using a variation of the User Profile Attribute Change file.

The reporting structure data is represented in three columns of the user profile that can only be updated using the Integration Server. “Current user” refers to the user whose record is being set – i.e. that user identified in the first column (“emailAddress”) of the line in the User Profile Attribute Change file.

managerUid: This is a unique internal system ID for a user, used here as a pointer to their manager. System UIDs are normally not visible to users or administrators; so this field is optional – and the managerEmail field is normally used instead.

managerEmail: The email address, used as the current user’s Connections Cloud login ID, that identifies the current user’s manager.

isManager: This is a single character flag that should be set to “Y” if the current user has any direct reports in the Org structure that should be shown. Note that direct reports will not be shown, even if other users have the current user listed as their manager, if this flag is not set to “Y”.

All of the above fields can be set (using the update action keyword) and modified as needed after users have been provisioned.
The Journal

Connections Cloud provides a range of audit trail information about user activity, in addition to the Metrics available through the Administration Interface. These records are available through the Journal function. Because not all clients use the Journal information it is not enabled by default, and so it must be requested via Support. A request needs to be made not only to enable Journaling, but to also provide FTP access to the server where the Journal files will be placed. Journal files are created once every 24 hours, and are removed from the FTP server after 7 days. It is the client’s responsibility to download them during this time. The Journal files are machine readable CSV files that can be loaded into a database, reporting tool or spreadsheet for analysis.

If you are used to tracking usage on your current system, and want to be able to do similar things in the cloud, you should have the Journal enabled. **Enabling the Journal is optional - it is not required for, or used in, the migration.** It can be enabled at any time.

The account that is used for FTP access needs to have Admin role. It does not need to have User role or any cloud service subscriptions associated with it. More than one account can be assigned access. Consider scripting the daily access and download.

To enable Journaling, and get FTP access, open a Support ticket (PMR), as follows:

**Subject:** Enable Connections Cloud journaling and grant FTP access

*Please turn on Connections Cloud Journalling, and provide FTP access to the following account(s)*

email@yourcompany.com

**Company name:**
Connections Cloud Customer ID:
Data Center:
Your contact information:

Accessing the FTP Site is done by logging into the FTP server with the user ID and password of the account for which you requested access.

Login to:
replace XX with your cloud datacenter (na, ce, ap)
using Implicit encryption FTP over TLS

For more information, see:
http://www.ibm.com/support/knowledgecenter/SSL3JX/admin/journaling/I1_journaling_overview.html
http://www.ibm.com/support/knowledgecenter/SSL3JX/admin/journaling/I1_journaling_format.html