ADOPTEQ

INVESTIGATOR PLUS PLANNING & OPERATIONS GUIDE

Version 3.1
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About Investigator Plus Documentation

Documentation for Adopteq's Investigator Plus Product:

- Release Notes – Describes the current release of the product including any new, enhanced features, resolved issues, and known limitations.

- Installation Guide – An orientation to the product's basic purposes, features, and capabilities. It documents system requirements and explains how to install the software and obtain licensing.

- Planning & Operation Guide – summary of the product's primary components and features, overviews of component and process instructions and guidance on various levels of scan.

  Please note that Lotus Notes and Domino are used interchangeably within this document for ease of legacy understanding and wording.

Purpose & Audience

This document provides information on how to configure the Product and analyze your Domino databases to plan the most suitable migration destination.

This document assumes the reader has a minimum of one year's experience using a Notes Client and has a good general knowledge of Domino Administration, the Domino designer client as well as Windows administration, SharePoint, and the Power Platform. If Domino/Notes topics mentioned in this guide are not understood, please refer to the HCL Notes or System administration documentation. This guide does not aim to contain exhaustive content related to Microsoft technologies. Please refer to https://learn.microsoft.com/en-us/docs/ for further information.

1. Product Overview

Investigator Plus is a content level collection and analysis product which is designed to collect meta data from your Notes/Domino environment, display the findings pertinent to migration and transformation and allow you to compliment your own findings for databases within the product.

Investigator Plus is a point in time collection production which does not require any deployment of agents or be run on a schedule.

When performing analysis, Investigator Plus is a product which provides technical information about your Notes/Domino environment and the applications hosted on your Domino servers. The deeper analysis required to determine the 'best path' for your applications is performed manually by consultants who understand both the source and the potential target environments.

2. Definitions

The following terms are used throughout this document. For clarity, a description has been provided:

"Investigator Plus" means the software product by Adopteq which is configured in an environment to collect metadata information on the Notes/Domino environment and a provides a user interface to add additional information for a database.

"Analysis" means the technical/automated assignation of difficulty based on meta data and/or human assessment of a database or business data collected about a database.

"metadata" means data about data/content in a database such as author, date modified, attachment type, or size.

"Scan" means defining a server or databases in Investigator plus to collect meta data on a server, database, or content level.

"Collection" means the same as scan and is used interchangeably.

"Level 1" means collection of meta data at the server level properties storing the catalog.nsf and names.nsf information in SQL.

"Level 2" means collection of meta data at the document level properties and storing in SQL.

"Level 3" means collection of meta data at the database level properties and storing in SQL.

"Hawkeye" means the physical analysis and review from experienced consultants to provide further insight into the application, and its difficulty to transform based upon the available platform(s).

"Content Target" means where the content of a database will be migrated to.

"Function/Logic Target" means the workflow of an application to provide functionality.

"UI Target" means the front-end application users will interact with to use an application/database.

"End Platform" means an additional platform in the target which will not receive content or workflow but may be the controlling platform or a separate project taking care of certain databases. i.e. implementation of CRM or PLM solution.

"Exclusions" means databases and folders which will be disregarded during the collection at Level 1

"SQL" means the storage location of the Investigator Plus database which can be SQL Express or the complete version stored on the Investigator Plus server or as a SQL instance.

"Power BI" means i) the Microsoft product where reports are created and maintained, ii) the desktop application which is used to create and maintain the report(s) and iii) the license which is required to save and publish reports for others to interact (published reports require all users to have a Pro license to view and interact).

"Access" means having a valid NotesID which has the necessary ACL's and Roles to collect information about databases in Notes/Domino.

"Restrictions" means databases or servers which the Investigator Plus NotesID does not have full or partial security rights and cannot collect the information.

3. Analysis Concepts

Investigator Plus is a product providing data points on Lotus/Domino applications based upon future platform capability but also provides a workspace to enter business data points and define the journey of the application along. This section covers the steps of analysis as it relates to Investigator Plus, the concept of application journeys.

A. Process/Workflow

Investigator Plus is built to follow the workflow below always beginning with a L1 or Level 1 collection (details of the collection are provided in section 4.)

Analysis Workflow
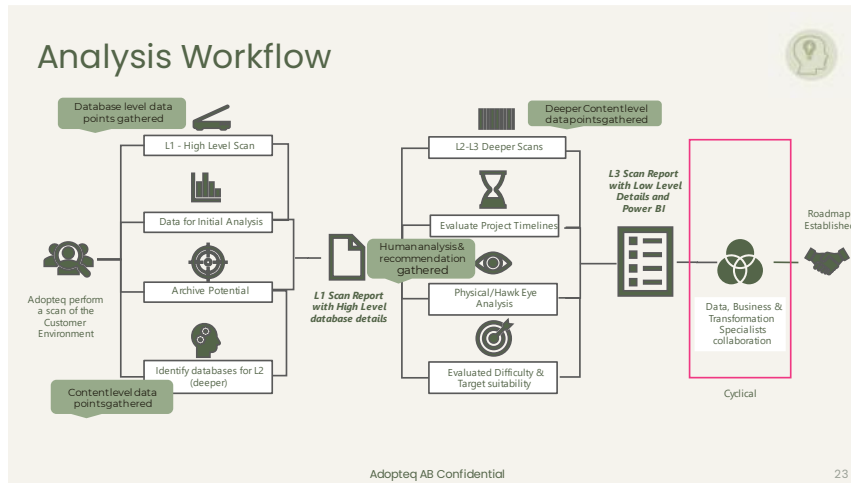
Once the technical metadata has been collected and stored in SQL, a consultant performs 'Hawkeye' analysis. This is when a consultant will open the Notes database, review the function (both business and technical), the content important for migration and any 'red flags' which have been highlighted from the technical scan/collection. At this stage, the consultant will make a recommendation of the target and a potential effort estimate for transformation to the target. The final decision is the responsibility of the Company.

B. Planning Collections

Analysis has multiple phases. The first is the collection of technical metadata about a database and within a database.

Level 1 collects server by server and is executed one by one. Level 2 and above is recommended to group databases into a logical format so that you optimize the time the collection takes. For example, group databases with smaller documents count on a server-by-server basis first and schedule the larger databases to run during the night or during weekends.

When performing collections on a large estate or a dispersed Domino organization, it is recommended to have multiple Investigator servers running concurrently to increase the speed of the collection. The database is centrally located so irrespective of which instance of Investigator you use, the updates will occur in the same location.

C. Managing an Analysis Project

This section is not extensive and should not be viewed as a replacement for a services engagement. The below acts as guidance on how an Analysis project could be executed. We recommend that the analysis is approached from a target capability perspective rather than 'how was it done in Notes'. How difficult an application was developed in Notes, does not reflect the complexity of how, necessity, or where it could be created in the future.

1. Defined expected outcome of the Analysis
   a. Target technologies mapping
   b. Other projects ongoing for Notes/Domino retirement
   c. Data Reporting
   d. Effort estimation
   e. Timeline mapping
2. Find the right team members

    a. Team members who understand both the source environment and target environments capabilities.

    b. Project Manager

    c. Business liaison

        i. Generally, technical information is insufficient other than for archival to determine the future of an application. The use, ownership and other business-related information of the Notes/Domino environment is required. By adding context already known about the application, it will provide a more rounded view of the transformation journey.

3. Product configuration requirements

    a. Size of the analysis including geolocation, number of servers and business units

        i. How many servers should be set up to gather the data metrics needed in the time available?

    b. Custom data metrics required

        i. If there is a consistent field populated within the Domino environment that is important to collect such as a data privacy tag, this should be added during the configuration phase of Investigator Plus.

4. Reporting

    a. Where the information be stored for interactivity between team and application owners

    b. What reporting application will be used to generate dynamic reports

    c. Information expected in the reports

5. Target Platforms & Effort

    a. Define effort values for recommended targets (Adopteq 'standard efforts' are built into Investigator Plus and can be adjusted as required. To determine effort, Hawkeye should be performed by an experienced consultant.

6. Project Communication

    a. Both internal and external communication to publish progress and prepare the user community for change

    b. Engagement with the application owners

7. Analysis Process

    a. Clear workflow to show the cyclical process of analysis until a business decision has been made regarding the future of an application

4. Levels of Collection

Adopteq Investigator Plus collects datapoint in 3 phases to maximize the efficiency of the information gathered in your environment. The following section details which information is gathered and the output of each level as it pertains to assessing an application's journey.

Investigator Plus does not read or collect the content of a database, only metadata.

A. Level 1

The highest level of scan which collects information at a database level from the database catalog and names.nsf. This scan, due to the content it collects is fast and collects information on a server-by-server basis leveraging a connection document. This scan will create a unique ID in SQL for every database found on a server which is key to maintaining the structure for further collections. Level 1 provides an inventory list of all Domino databases available in the environment including replicas.

The L1 scan gathers the following database information:

- Database ID (Generates a numeric id for each database)
- Server (it resides on)
- Title
- Path
- Size
- No. of Views
- No. of Agents
- No. of Forms
- No. of Documents
- Template
- ReplicaID
- Database last access date
- Investigator Scan date

In the product configuration (provided later in this document), certain types and locations of databases can be excluded to reduce the volume of unnecessary information collected such as the \mail or domino system databases. Standard defaults are set in Investigator Plus.

B. Level 2

The deeper scan level which looks at the document level properties of a database is known as Level 2 (L2). This collection is the most time-consuming to run due to the nature of the information collected. The list of what is collected is:

- Forms
  - No. of Used Forms
  - Form name
  - Form ID
  - Stored forms (present or not)
- No. of OLE objects
- No. of Encrypted items
- Attachments
  - No. of Attachments
  - Attachment types
  - Attachment name (file name)
  - Attachment type (file extension)

- No. of Response documents
- No. of Contributors (Authors)
- Agents
  - Agentname
  - Agenttype (Scheduled or triggered)
  - Timestamp when last run'
  - No. of scheduled agents
  - No. of triggered agents
  - Timestamp of last 'agentrun'

- Hidden Design (present or not)
- Links
  - No. of Links (Notes links)
  - XPages (present or not)
- Updaters (Name and number of updates)
- ID
  - UserID with expiration date
  - ServerID with expiration date

C. Level 3

This is the deepest scan level which looks at specific content and is known as Level 3. This collection collects data on the database properties, which is one reason why this collection is separate from L2. Another reason is that at this level, custom fields can be added to collect environment specific information (such as a data privacy type field). This collects the following information, important to understand when you are migrating content or determining the best target:

- Missing documents (will show if there are documents without a form)
- Access & Security
  - ACL's set
  - Roles
  - No. applied to the database
  - Name of Role
  - No. of Reader fields
  - No. of Author fields Reader information

  - Username access
  - Writers access
- Database Usage
  - last day, week, month etc.
  - By username
  - Last read timestamp
  - Number of documents read
  - Username
  - Last write timestamp
    Number of writes

- Links (appended from Level 2 for each link)
  - Source link address
  - Target link address
- Forms (appended from Level 2 for each form)
- Field names
- No. of documents
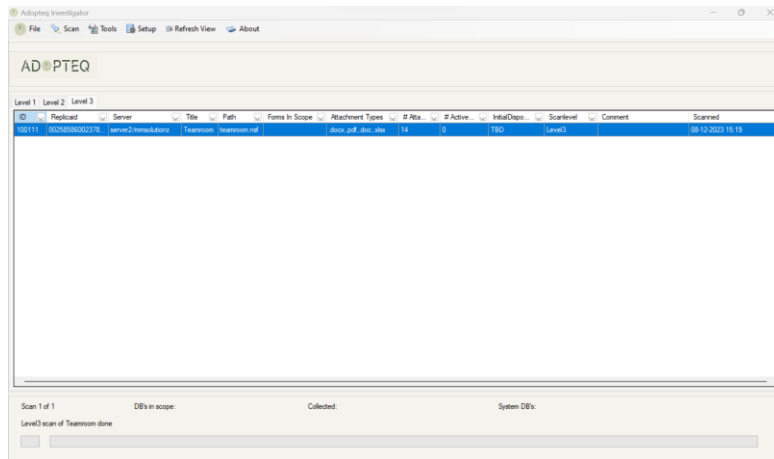
5. Architecture of Investigator Plus

A. Architecture Diagram

Investigator Plus works on the principle of Access to Notes/Domino and the databases for scan/collection, collection of the meta data in a SQL database and Investigator Plus as an application. SQL can reside on the same server as Investigator Plus. Each subsequent instance (if required) would use the existing SQL database.

There is no additional load (over and above the addition of a Notes ID super user) accessing the Domino environment.

Investigator Plus does not use agents installed on any Domino server.

- 1. HCL Domino server(s)
- 2. Investigator Plus Master workstation hosting SQL (see optional)
- 3. Investigator Plus collection workstation(s)
    ** Number or necessity environment dependent
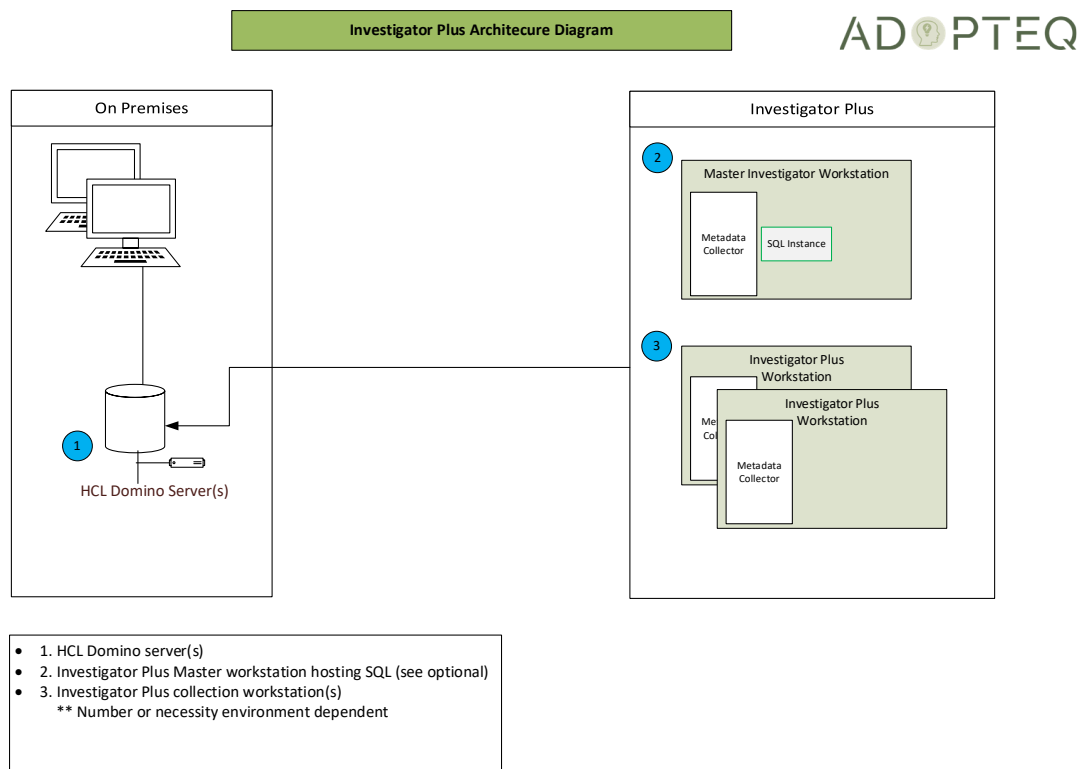
B. Network Architecture Diagram

Investigator Plus uses Notes NRPC to connect to Notes to collect meta data and communication between the Investigator Plus to the SQL server using TCP 1433.

Investigator Plus Network Architecure Diagram
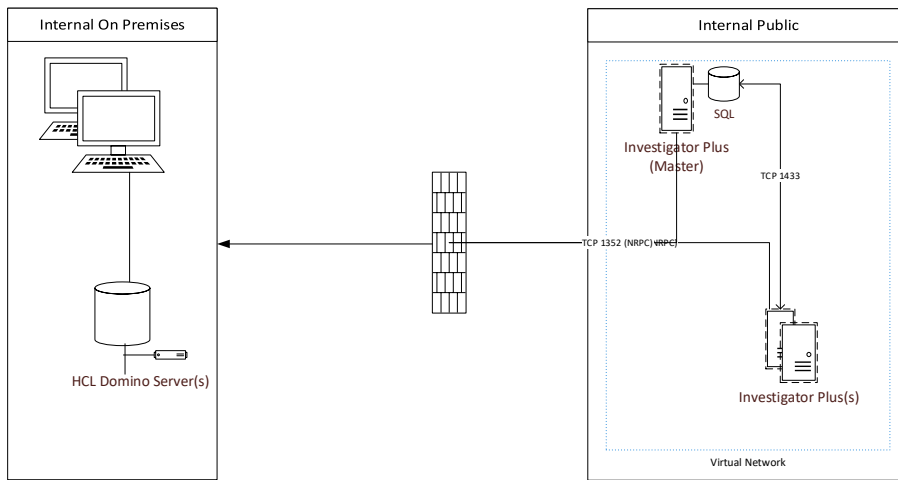
6. Installation of Investigator Plus

Refer to the Installation Guide document for step-by-step instructions on the installation of Investigator Plus. During first time run of Investigator Plus, post installation or upgrade, the product will check for a connection to the SQL database.

7. Investigator Plus Setup

The installation of Investigator Plus is documented in the Adopteq Investigator Plus Installation Guide. After installation, the first time Investigator Plus runs it will automatically open the Setup section.

Investigator Plus Configuration Tab.

1. For Investigator Plus to run it will need to create a SQL database

2. Enter the details for the SQL server
    a. if using SQL Login
    b. SQL username (this is often named sa)
    c. Password for the SQL User
    d. If SQL is setup to use windows login check the "Use Windows Login". If this is checked the SQL User and SQL Password is not needed.
3. Once the data has been entered, SQL availability and configuration is required. There are 2 steps. The first is to check connectivity and the second is to create the tables in SQL for Investigator.
    a. Step 1 is to 'Check Connectivity'.

    b. If the Database is available, a 'connection open' confirmation box will appear (1).
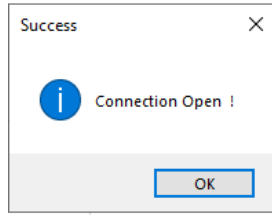
c. If the database is not available, an error message will be displayed
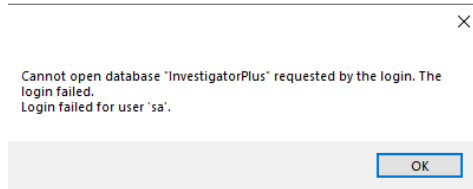
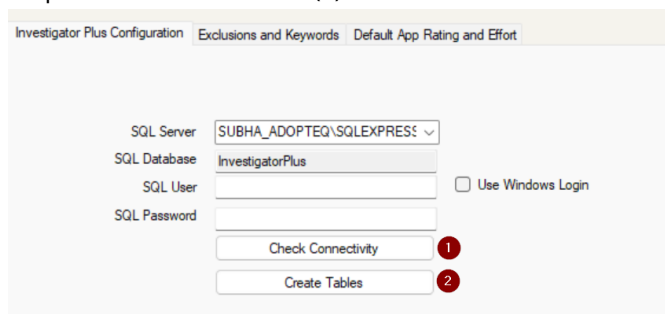d. When you click 'OK', a dialog box will ask if you wish to create the database. Click 'Yes'
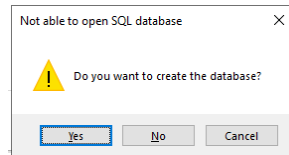
e. When the database has been created, a success dialog box will be shown.
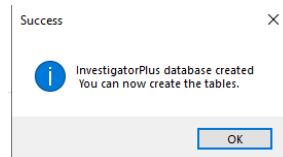
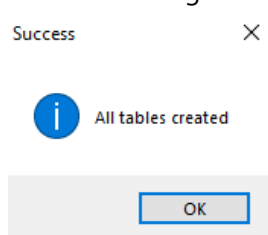f. Click 'OK' which will test the connection to the database and click OK again
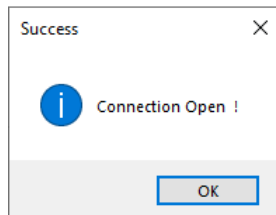
g. Step 2 is to Create Tables (2)


h. Press the 'Create Tables' button. This will create the tables in the SQL database.

i. A success dialog box will appear

NOTE! If Investigator Plus has an earlier version installed, an upgrade the current version will occur and restart Investigator Plus.

4. Reset Counters. This controls the unique numbering sequence databases will be allocated when the Level 1 scan is executed. We recommend assigning a number which will be large enough for the estate you will collect for example 1000001.

   a. To reset the counter provide a number in the Starting # field and click on Reset Counters.
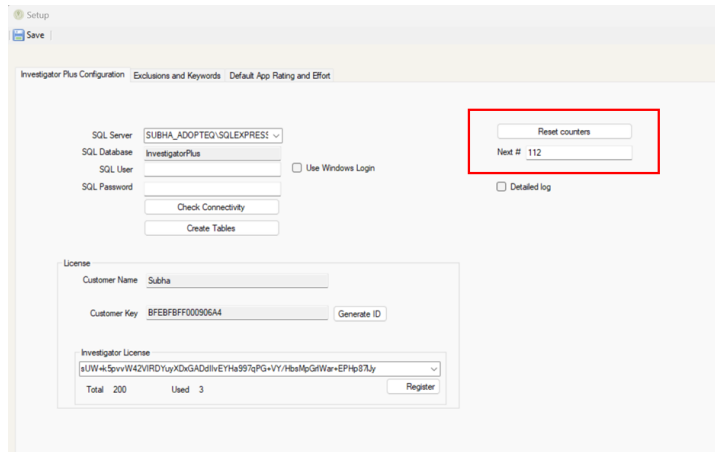
   b. When prompted click on Yes to continue.
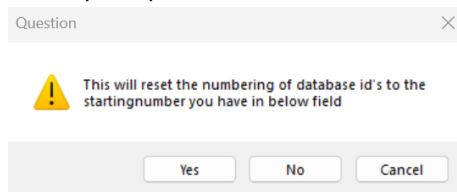
5. Licensing must be completed and valid before Investigator Plus will execute a collection at Level 2 of greater. The license key is provided by sales@adopteq.com.
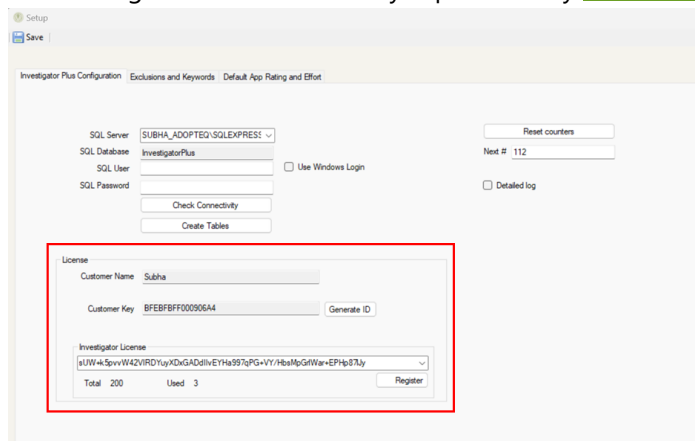
C. Exclusions and Keywords Tab

This section of the setup allows for database type and system folders to be excluded, to manually adjust process status flags for Hawkeye and to configure any additional End Platforms the target environment may contain.

1. The exclusions list is blank upon initial view. To add the standard default exclusions, press 'Add Defaults' button (e.g., names.nsf, schema.nsf, log.nsf…)
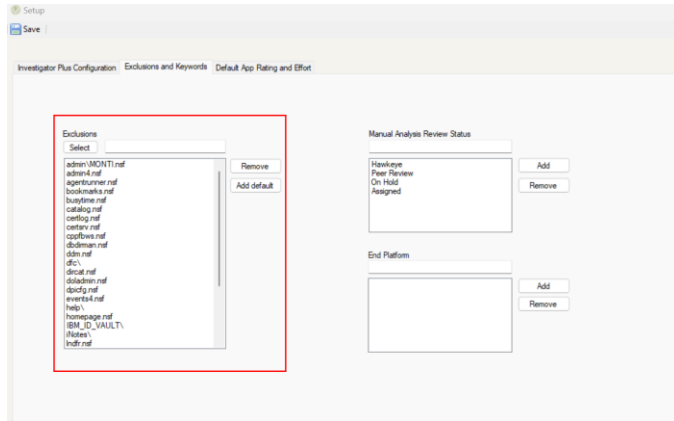
2. Should your environment have known locations containing additional database types you wish to exclude, these can be added using the 'select' button.

3. To define the scope of the collection/scan instance, navigate to the scope definitions tab and click on **Select.**
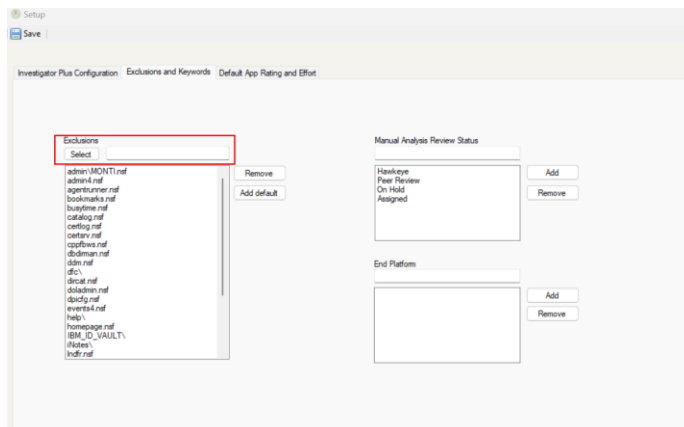
4. To connect to Domino, provide you Domino ID, password and click OK
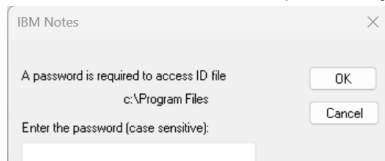
5.

6. Select the server you want to scan from the dropdown and then select the databases you want to exclude from the scan. Click on **Add** to continue.
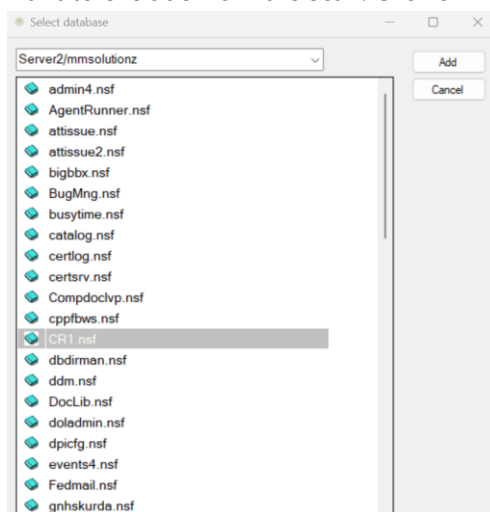
7. Manual Analysis Review Status provides customizable analysis steps for consultants to follow and update when executing a "Hawkeye" analysis of a database.
   **Note:** Use of the status is optional
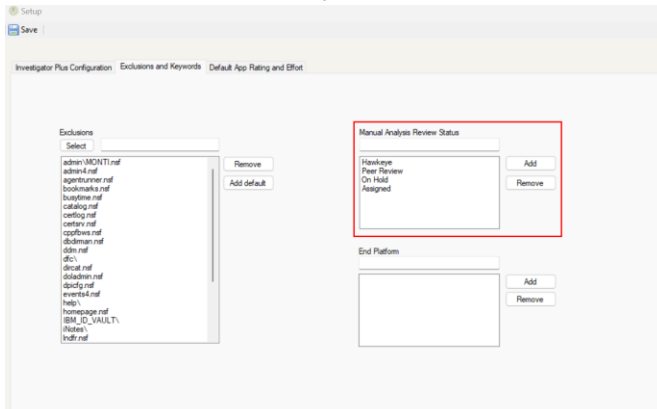
a. Tracking the status of the analysis database by database is helpful for larger projects in the environment to ensure all in scope databases have been analyzed and to provide a status to completion.

8. End Platform is not the sames as 'Target Platform' but is provided where there may be additional platforms in the target environment but not necessarily impact the future of an application for the transformation team. If a database is already scheduled for deletion, this could be documented in the 'Final Platform'.
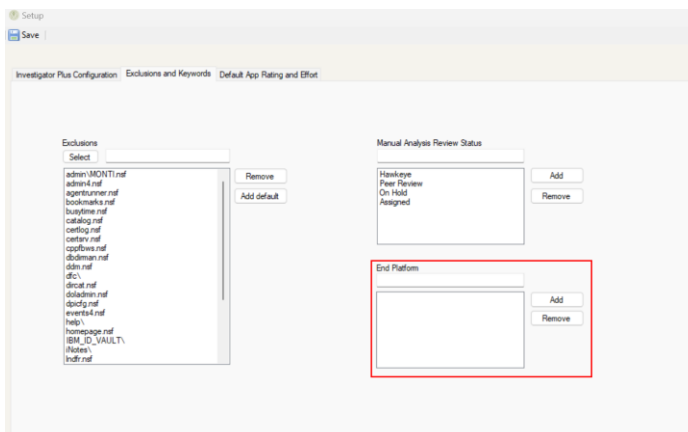
a. The user and configuration of this section is optional. Below is an example of how it can assist in recording an application transformation journey:
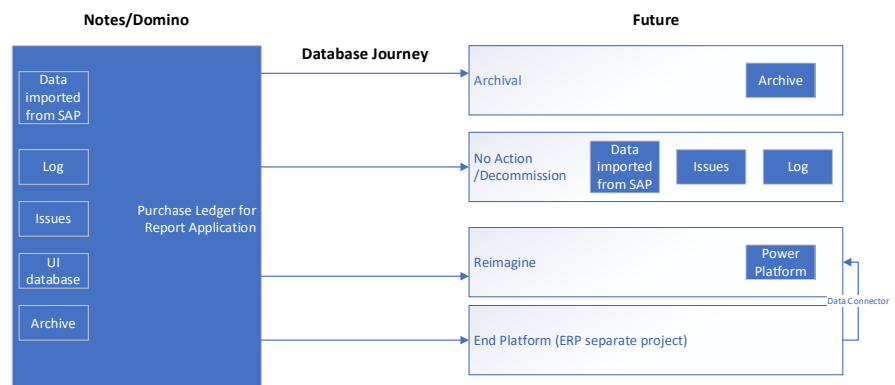

i. The application "Purchase Ledger for Report" application is comprised of 5 databases. The journey of those databases are as follows:

1. Archive (data archived from the 'Data imported from SAP' database is migrated as EML as per data retention policies

2. 'Log', 'Issues' and 'Data imported from SAP' are no longer required as the business and applicaton workflow no longer requires these databases or their content to work on the new platform

3. The UI database which the users interact with to build reports is recreated (in this example in the Power Platform)

4. The End Platform in this example is the new or existing ERP system (such as a SAP) which the reporting application will be connected to.

   ii. There is only one **content target** platform = Archive

   iii. **There function/workflow and UI** platform = Power Platform

   iv. The **End Platform** is ERP

D. Default App Difficulty & Effort Tab

A large part of Analysis is to determine not just what applications are required but also estimate how much effort an application migration/transformation project from Notes/Domino may take. Investigator Plus contains an effort level matrix based upon experience which is used for this purpose (provided as an appendix to this document for reference).
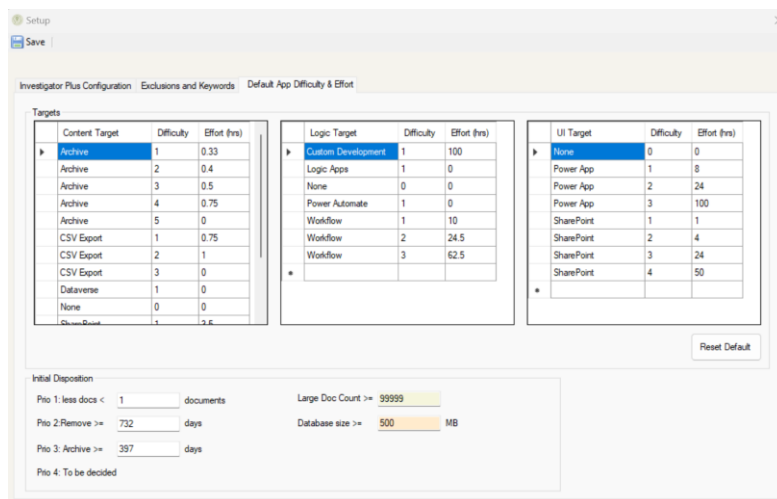

If you wish to use Adopteq's default difficulty and effort level, select 'Reset Default. The use and configuration of this section is optional.

1. Types of Targets (content, logic, and UI Target).
2. You may add additional options such as 'Delete' if you have information gathered already to determine which databases will require action.
   a. Adding this information to the SQL database will provide a more comprehensive report in Power BI.
3. A custom end platform can also be set such as a known project platform managed externally (see Exclusions and Keywords).
4. The parameters for categorizing archival, large documents, target difficulty ratings
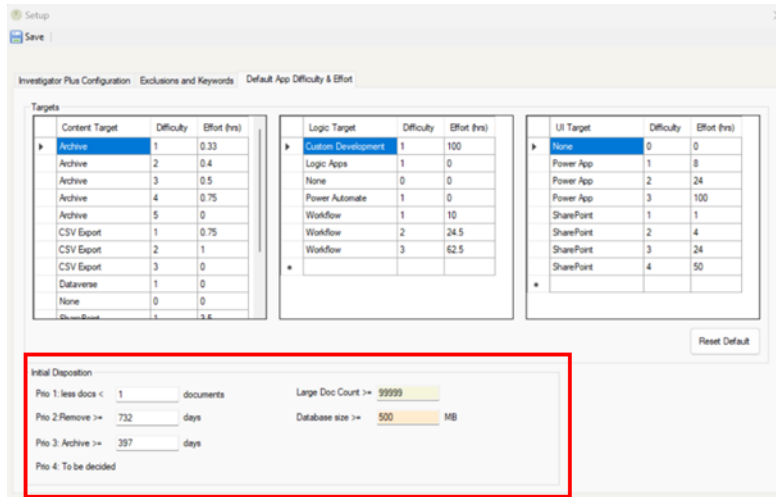
5. Here is an example of how Investigator Plus can assist in recording an application transformation journey:

   a. If the database satisfies the conditions configured in the size and age section, the initial disposition will be set after Level 1. Databases which have content 'red flags' will be highlighted in the Level 1 view in Investigator Plus .

   b. If database document count is less than 1, a comment will be entered in the 'comment' field stating, "Less Documents".

   c. If the 1st condition is not satisfied and the database last used date is more than 732 days (about 2 years) from the scan date, Investigator Plus will recommend removing the database and mark as 'Remove' in the 'Initial Disposition' column.

   d. If the above 2 conditions are not satisfied and the database last used date is more than 397 days (about 1 year) from the scan date, the Product will recommend archiving the database. Archive will be added to the 'Initial Disposition' column.

   e. If all 3 conditions are not satisfied the Product will state 'TBD' as the initial disposition (Level 2 onward are required for any other than Archive/Remove)

   f. If the document count is more than 99999, the database will be marked as a database with a large document count in the comment field and highlighted in the view to stand out.

   g. If the database size is over 1000MB, it will be marked as a large database in the comment field and highlighted in the view to stand out.

   h. If a database has 4 or less documents, the comment field will be populated stating "Low Count"

6. Click on 'Save' to save the set up.
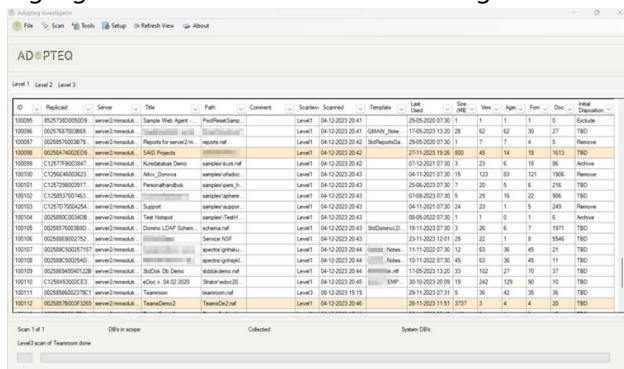
8. Performing Collections

Regardless of which level of scan you wish to run, the initial high-level scan (Level 1) is the first and mandatory scan needed to create a full inventory of each Domino database on the server(s) you choose to investigator.
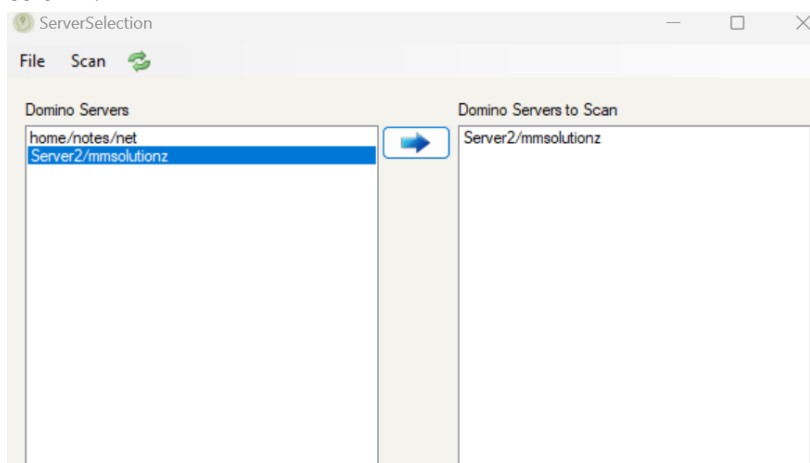
A. Level 1 Scan/Collection

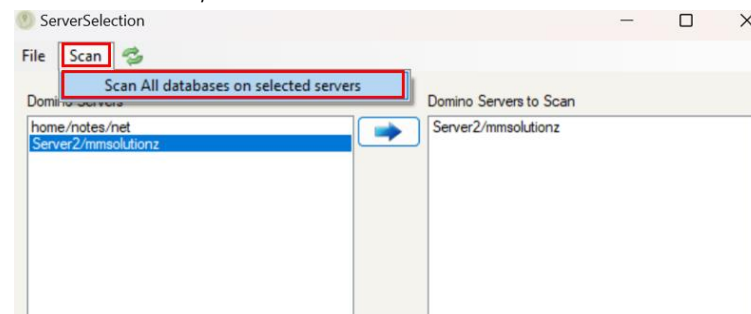Below are the steps to perform the Level 1 scan with Investigator Plus.

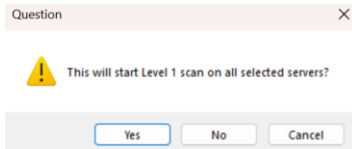1. To begin, navigate to Scan from the top menu and click on Scan->Level1->Initial Level 1
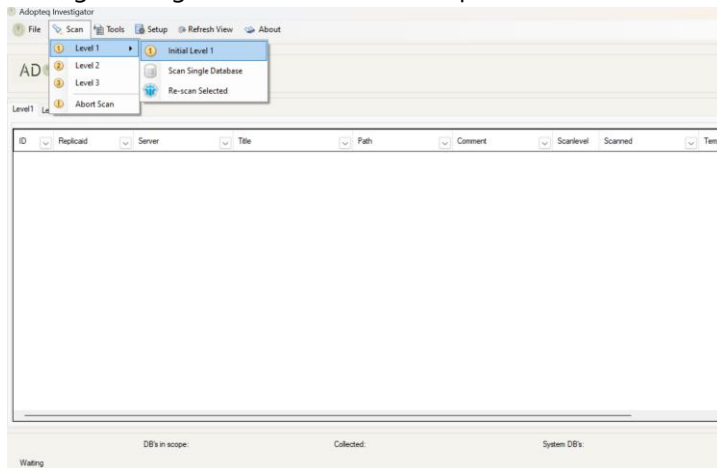
2. Move the server you want to scan from available domino servers to Domino servers to scan column.

3. To start the scan, click on **Scan** and then click on **Scan all databases on selected servers**.
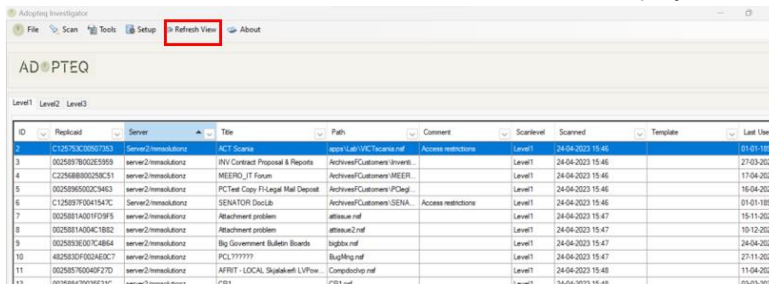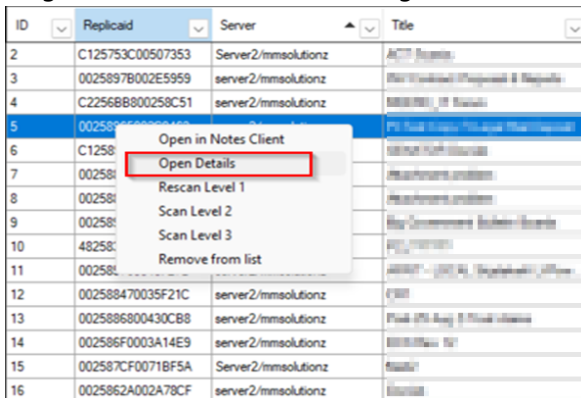

4. Click on Yes to continue.

5. You can track the real time progress from the progress bar at the bottom of the window
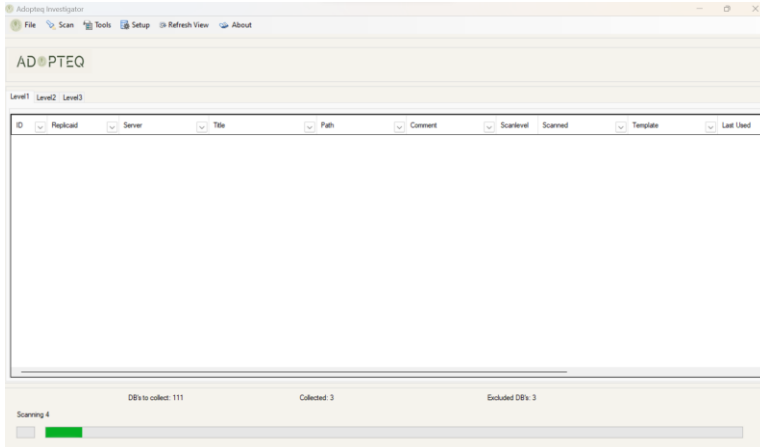
6. Click on Refresh View to load the scan result in the display view

7. To get more details of the scan, right-click on a database and click on Open Details.

NOTE! After each collection, more data is populated. Post Level 1, limited data will be shown in the 'details'. [Insert details screenshot post Level 1]

8. If you wish to restart scan on a database, select database from the display view, right click and click on **Rescan database**.
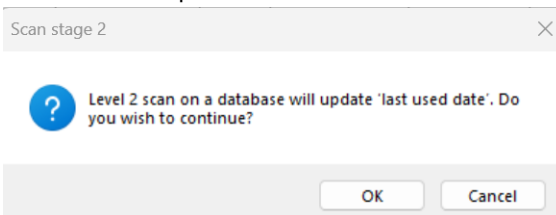
B. Level 2 Scan

The steps below describe how to perform a Level 2 document level scan of databases. Note that not all information collected is populated in the UI after Level 2. Level 3 is required for certain data points.

1. To perform a level 2 scan, select a database from the default Level1 display view and click on Scan Level 2.
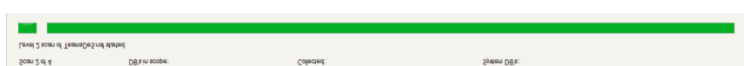

2. Click on OK to proceed.

NOTE! This will take time. Plan accordingly for the size and location of databases you have selected. If you are confident of the types of databases you are looking for, sometimes there is no need to run this level until you are ready to move into the Migration phase with Migrator Plus.

3. When L2 and L3 are executed will depend upon the approach of the project.
4. Progress can be tracked from the progress bar at the bottom. Once complete, you will get a message like this.

5. Go to the Level 2 tab and click on Refresh view.

6. The table list shows only fields collected during a Level 2 scan

7. The details windows will display more collected information about the database at this time. Right click on a database entry from the Level 2 view and then select **Open Details**

8. The **Database** tab within details provides information about the usage of the database and design aspects. Not all information is displayed at Level 2 and Level 3 is required for certain information such as usage over a time span.

9. To get more details on the document click on the **Documents** tab. You can get database usage information from a document creation perspective. You can get insights like number of documents in the database, prime contributors for the documents, frequent updaters to these documents.
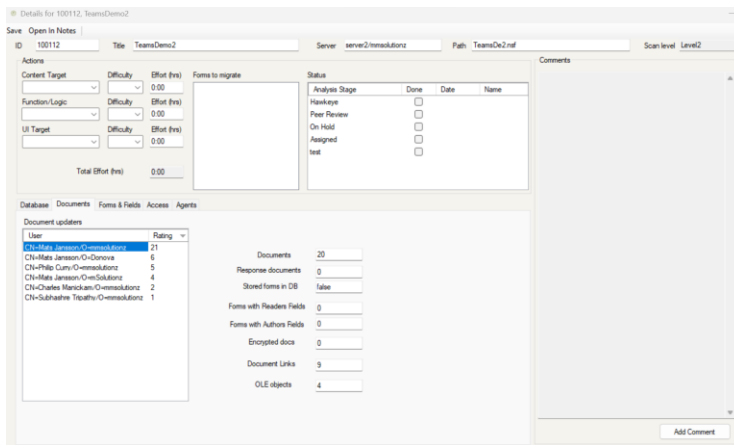

10. To get more details on database design go to the **Forms & Fields** tab. This tab contains important information as it relates to what should be migrated and the current complexity of the database content structure.
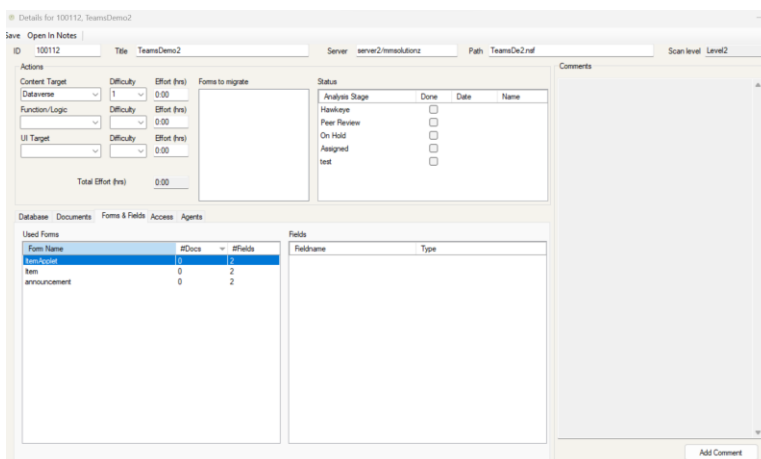
11. The **Access** tab provides insight into who has access to the database and how the database is permissioned but is only populated after a Level 3 scan.
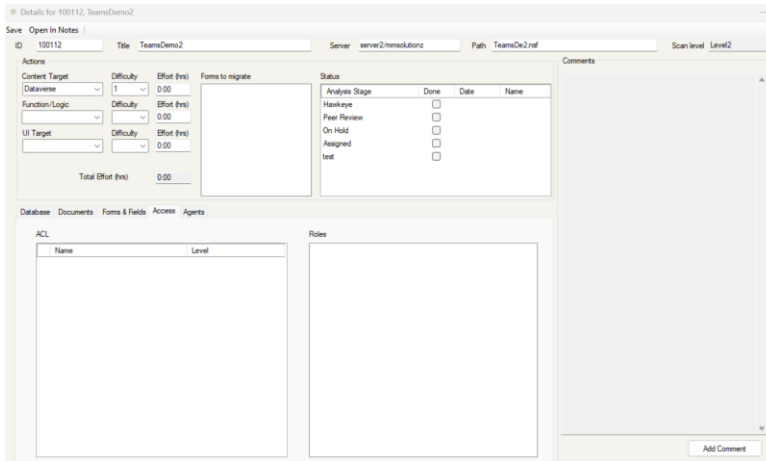
12. The Agents tab lists the agents which are prevalent in the database, both scheduled and triggered and the last time they ran. Depending on which scan level has been executed will depend on the information available.
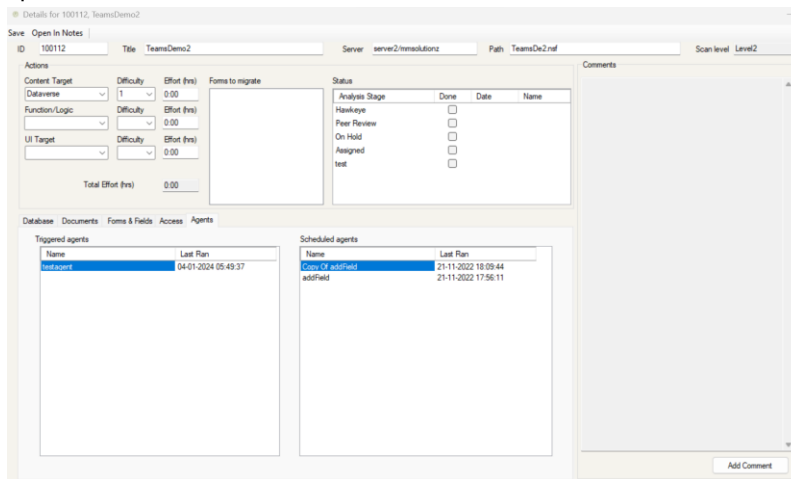
C. Level 3 Scan

Once both Level 1 and Level 2 scans are complete, Level 3 is the final scan to collect database property information. Depending upon what surfaced in Level 2, Level 3 may not be of value to run. Level 3 is the smallest, yet deepest scan Investigator Plus performs.

1. To start a level 3 scan, select a database from the default display view Level 2 and click on Scan Level 3.
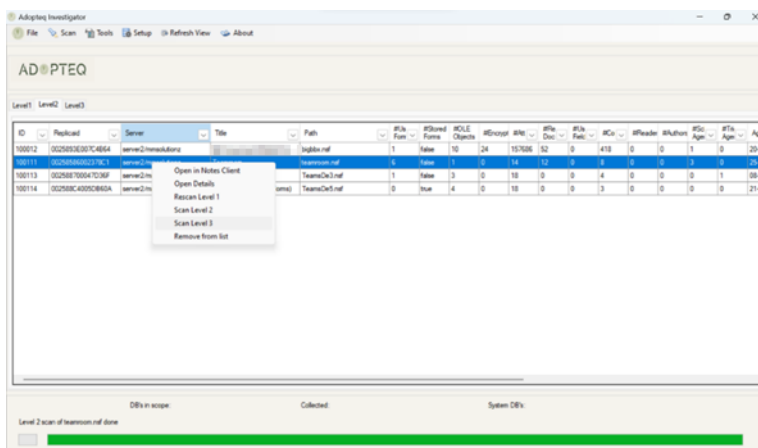
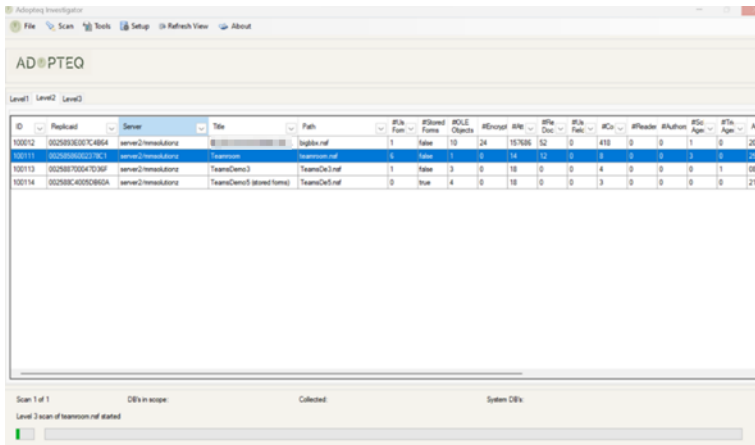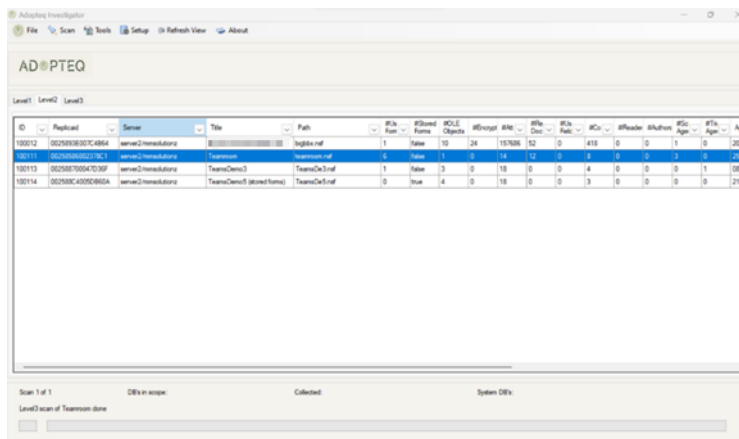2. You can track the progress from the progress bar at the bottom.

3. Once the scan is complete, go to the Level 3 display view and click on **Refresh View**.

4. The additional information gathered at Level 3 are shown in the table view
5. To view additionally collected information on a database, click on **Open Details**.
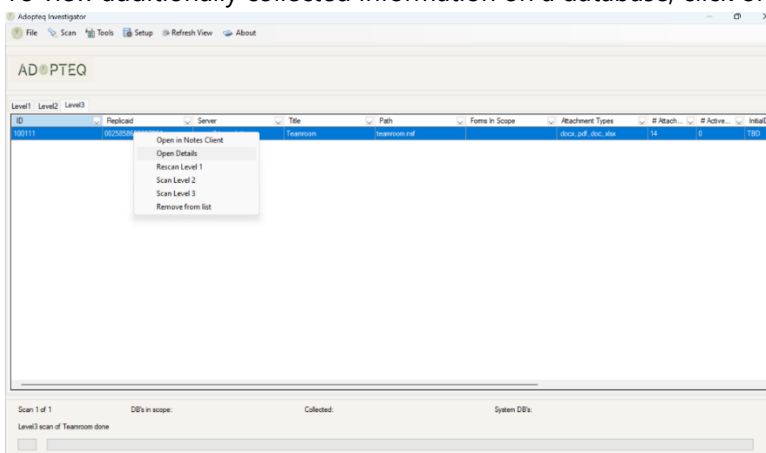
6. After a Level 3 scan the advanced database usage information will be available.
7. To view more details go to the database tab on the details page.
   a. Information like database usage in last month, database usage in last week available at this stage, which is important in determining the importance of a database based on usage.
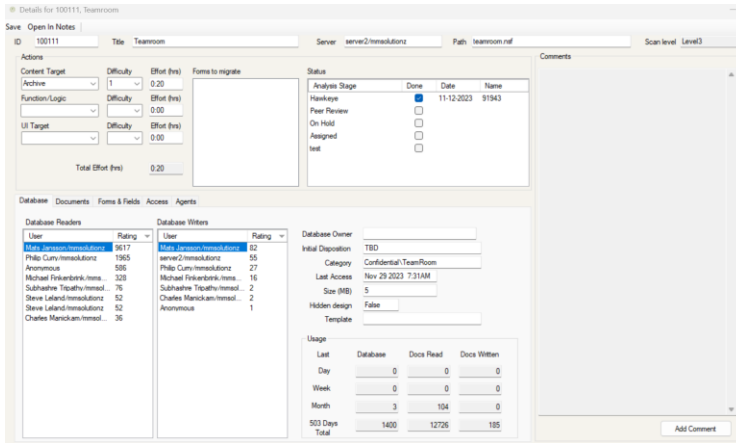
8. To review gathered data on documents go to the **Documents** tab.
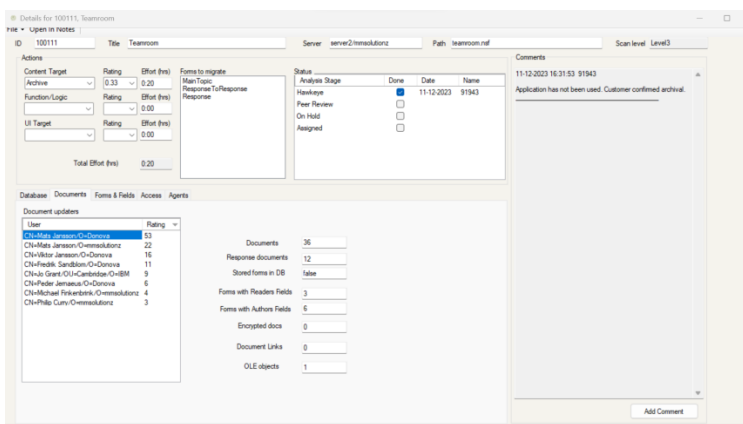
9. To review gathered data on forms and fields go to the **Forms & Fields** tab
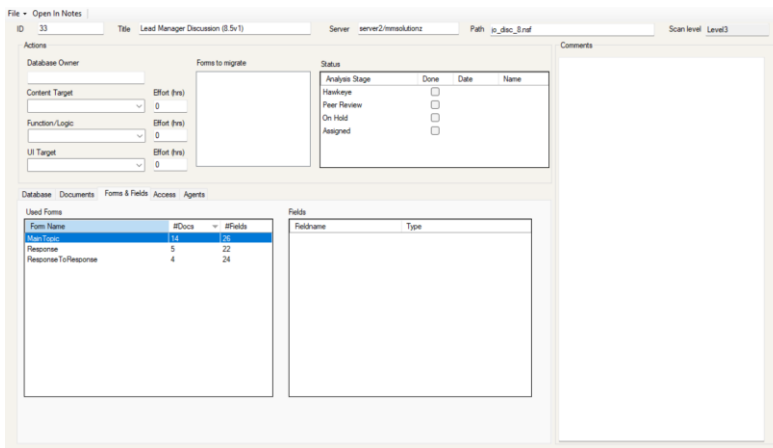
a. In this tab, you can review the **Used Forms** for importance to migrate. When forms are determed to have value in a target environment, right-click the form and 'Add to **Forms to Migrate'**

10. To get more information on database ACL go to the **Access** tab on the details page.

11. To get more information on agents go to the **Agents** tab.

9. Investigator Plus Collection Management

A. Export

There can be a requirement to export information gathered by Investigator Plus to an alternative data source for reporting. An example of this requirement could be that you wish to store and collaborate on expanded analysis with team members who do not use Investigator Plus.
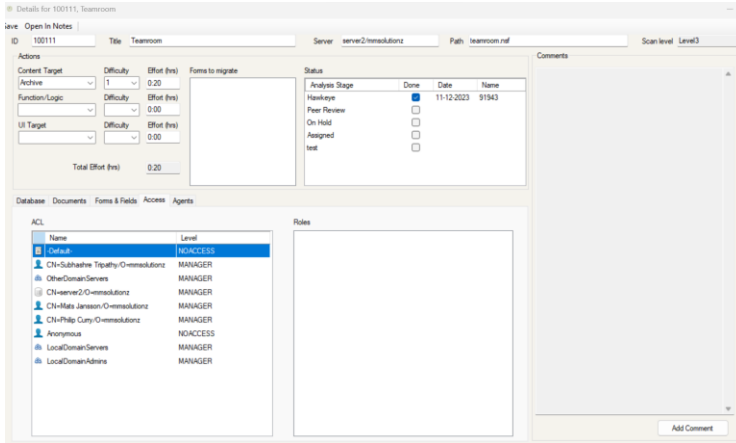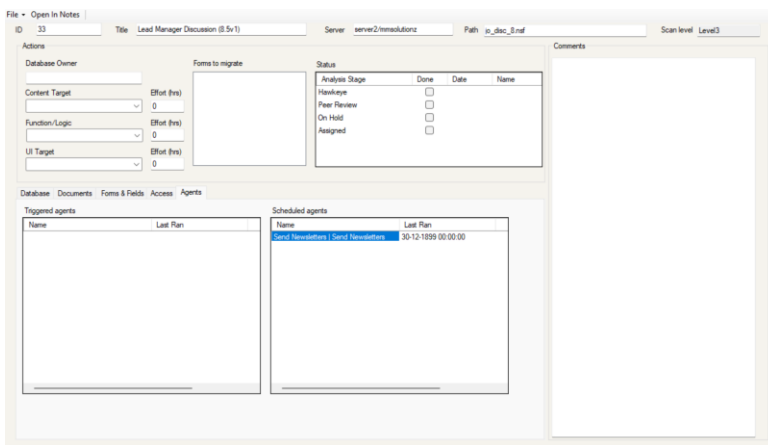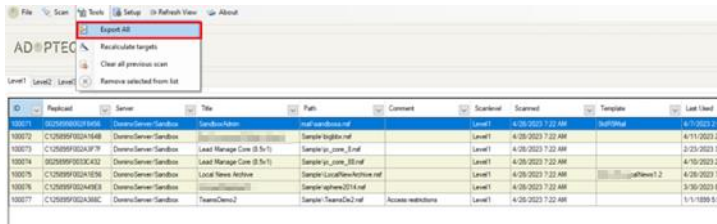
To export the data from SQL, perform the following steps:

1. To export the data points collected in the scans to excel, go to **Tools->Export All**

    a. Select the folder to save the export and give it a name. Click on Save.
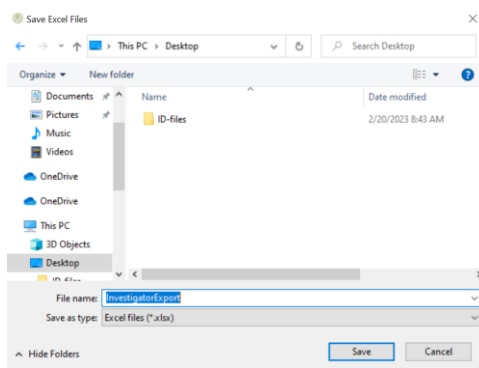
2. You will be prompted with a message to open the file. Click on Yes to open the exported file.
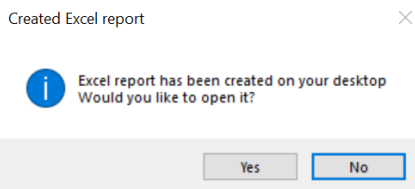
3. The details will be exported to an excel file.

Note: If you have more than 200 databases to export, the recommendation is to use SSMS export function directly from SQL to increase speed of export rather than the export function in Investigator Plus.

B. Recalculate Targets

The setup parameters for setting difficulty may need to be updated based on a new request such as increasing the archive number of days. If the setup is changed, this option will recalculate the disposition suggested by Investigator Plus.

C. Clear All Previous Scans

This option will delete any previous scan and works like a hard reboot. The only remaining information within Investigator plus is the setup parameters.

WARNING! This will delete all collected data. Only to be used for critical errors that cannot be resolved without beginning again.
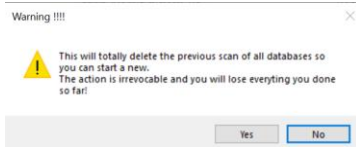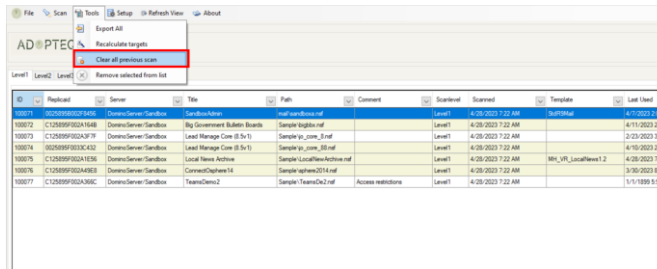
D. Remove selected From List

At times, there is a need to remove selected databases from the list of previously scanned databases (remove from scope, incorrect server scan or corrupt data).

1. To perform this action, go to Tools->Remove selected from list
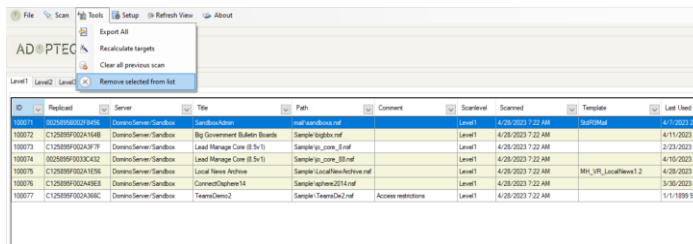
2. When prompted click on Yes from the prompt.
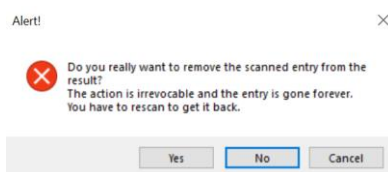
10. Hawkeye Analysis

Collecting datapoints on the status of databases is important to understand usage, remediation actions and content for migration however, understanding how a database is used from a business perspective, what is currently required and what is the future of the database, and best fit based on target is vital to building a migration or transformation roadmap. Investigator Plus has the capacity to record human (or Hawkeye) analysis.

This is executed by experienced consultants who understand Notes/Domino applications and also the capability of the target environment(s) in scope. At this stage of analysis, the consultant may adjust the target (content, workflow, UI) and the difficulty based on the various factors which will appear only during Hawkeye analysis.

A. Recording Hawkeye Information

All input from Hawkeye analysis is adjusted/updated from the 'details' window for each database. The information entered in this window will be stored in the Investigator SQL database.
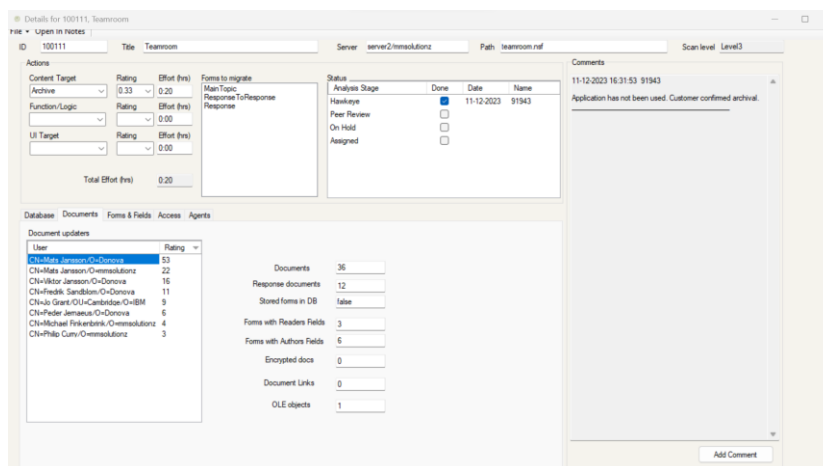
Consultants can provide context surrounding the database in Notes and it's suitability for a target. For example, if it is part of a larger group of databases, what the business use is, if it is similar to other databases. This is added in the 'comments' section.
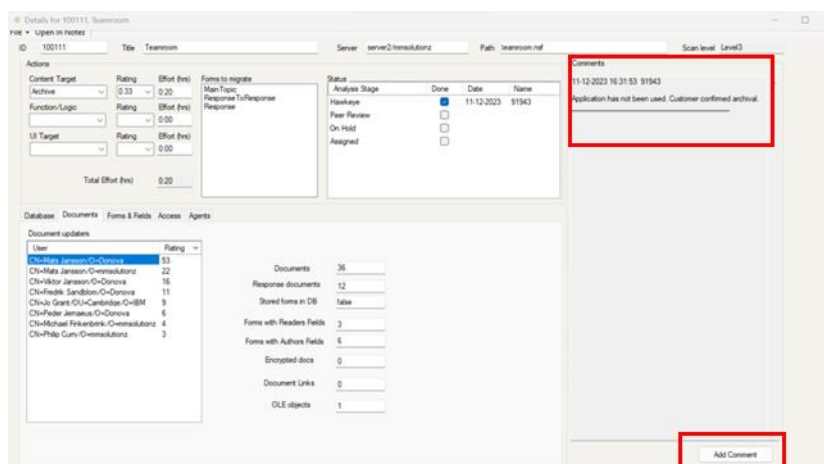
Consultants may also update the effort (override the default) during the Hawkeye review. There are multiple reasons why a manual effort change would be made.

Included below are some examples where the 'automated' effort based on only Notes/Domino metrics would change after a Hawkeye review of an application:

Example 1 - Application A contains 105,000 documents, with 7 used forms, has 10 agents and contains many attachments. Looking at the metadata only, the automated difficulty would indicate this to be a high level of complexity to migrate and transform using SharePoint & Power Platform which for this example we will give an effort in hours:

Application A	Effort (hours)
Content Target	24
Function/Logic	36
UI Target	10
Estimated Effort	70 Hours

Example 1 – Application A : Hawkeye determined much of the content does not need to be migrated and if needed, can be archived to EML. Only open items need to be migrated plus 3 months history of closed items. When looking at the 7 forms used, 4 are form types (e.g. keywords, announcement) which there is no need for in the new application. Of the 10 agents which have been run, only 3 workflows are needed to achieve the requirements of the business going forward. This means that the effort to transform the database has changed and requires a manual update:

Application A	Effort (hours)
Content Target	12 (SharePoint)
Content Target	0.5 (Archive)
Function/Logic	6
UI Target	5
Estimated Effort	23.5 Hours

Example 2 – Application B has the same functionality as 14 other application M-Z. The application could use SharePoint storage, a Power App UI with Power Automates, the effort in hours could be per application:

Application B + M-Z	Effort (hours)
Content Target	12
Function/Logic	24
UI Target	20
Estimated Effort	56 Hours

Automated difficulty would indicate each individual database requires the same level of effort meaning the effort would total 784 hours for the additional 14 applications or 840 hours in total.

However, Hawkeye could recommend that the Workflow and the UI are created once and then re-used with minimal additional effort for the other 14 databases which would reduce the **total effort to 280 hours**. This would result in a huge reduction in effort:

Application B	Effort (hours)
Content Target	12
Function/Logic	24
UI Target	20
Estimated Effort	56 Hours

The difficulty and effort would therefore be adjusted in each subsequent application to a subset of the original volume.

Application M – Z (14 db)	Effort (hours)
Content Target	12
Function/Logic	2
UI Target	2
Estimated Effort	16 Hours

Applications	Effort (hours)
Application B	56
Application M – Z (14 db)	224
Estimated Effort	280 Hours

Investigator Plus provides a standard input for adding comments for historical and reasoning purposes for applications analyzed. Alternative platforms can be used for collaboration and recording non-technical datapoints during an analysis project such as SharePoint however, there is no backward compatibility with SQL to flow updates back to a single source therefore, careful consideration should be taken when determining how the analysis project data will be stored and actioned upon in future.

11. Reporting

Reporting should display the findings as they pertain to remediation and migration/transformation. It should also display the potential scope as the outcome of the Analysis and be extensible for the ongoing analysis to determine the true scope based on the business needs and criticality of applications for example.

Analysis can be envisioned as a cyclical process with ever decreasing decisions made until your applications have a future path.

As part of Investigator Plus, Adopteq provides a Microsoft Power BI template to allow you to view standard reports based on both the L1 – 3 collections, the Hawkeye analysis performed and the recommendation/decision for the future of an application.

Investigator Plus does not contain a reporting function but the storage of all meta data within SQL means any reporting product can be leveraged to generate findings in a graphical format. This provides a flexible approach for the needs of analysis with no requirement for a proprietary client to view findings. Should a different reporting product be used, Adopteq can provide a copy of the SQL schema for mapping purposes.

Business Analysis which has been collected and stored in another database can also be collated at this stage and imported into SQL for reporting.

The standard reports provided by Adopteq are created in Power BI which provides graphical representation of analysed databases to assist with:

- **Project Executive** overview containing key metrics, findings, recommendations, and project execution scope
- **Scope & Budget** details database utilization, similarities, effort levels for migration, target recommendations based on the initial analysis. It assists with roadmap creation by providing recommended target platforms based on available/decided target platforms. M365 and Power Platform are usually the most common focus, but alternates are not excluded.
- **Server & Database** rationalization by highlighting consolidation and Archival potential.
- **Database Key Points** providing decision factors for target(s) compatibility such as size, document volumes, security structure, data structure complexity, external connectivity, and workflow structure.
- **Database Access** based on user usage to understand migration impact reduction and roll-out execution.
- User usage for **Ownership assignation**
- **Database Design & Security** highlighting migration restrictions would require remediation and the need for a target to provide granular security rights.
- **Accelerated transformation** based on database design and function similarities to build once, migrate many saving time and money.
- Inclusion of custom datapoints to help you align to target data policies (defined prior to collections)

A. Example of Power BI reports

During an analysis project, reports can be customized to suit the requirements of the analysis. The goal of utilizing Power BI is to be as flexible as possible with future requirements of analysis and

roadmap decisions. The goal is to build upon these reports as your roadmap to transformation becomes clearer.
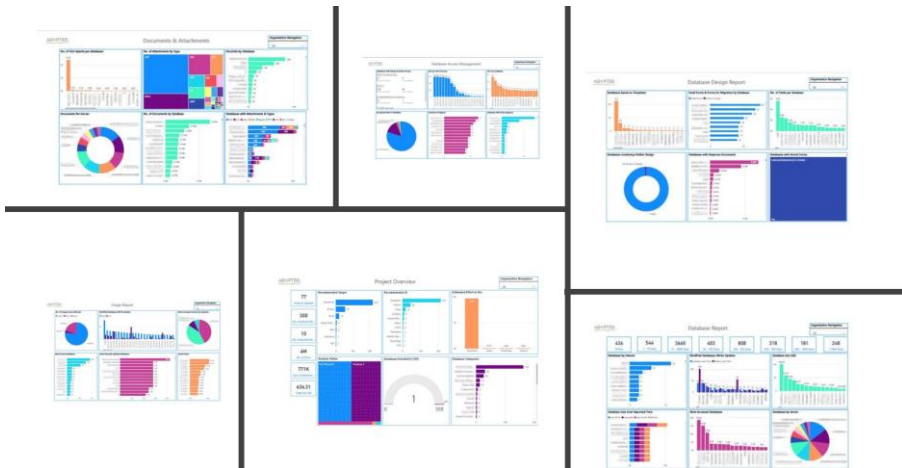
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