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CPAM to ICPAM Migration Pre-Upgrade Assessment Checklist

Overview

Cisco and Identiv have partnered to provide a migration path to the Identiv Connected Physical Access Manager (ICPAM) from Cisco Physical Access Manager (CPAM). Customers are encouraged to migrate to ICPAM in order to continue expanding and extending their access control system. The ICPAM software will work with both the new EM-100 Controllers and existing Cisco Physical Access Gateways. However, the existing Cisco Physical Access Manager (CPAM) software will not support new EM-100 controllers nor additional new hardware or software features released by Identiv.

Migration Request Process

The process used to plan and work with customers for the CPAM-to-ICPAM migration includes:

1. Submitting an Upgrade Request ticket to Identiv Technical Support. This is done by providing your customer and contact information by going to Identiv Technical Support at **http://support.identiv.com/icpam/** and clicking on "Contact Support".

2. Completing this pre-assessment checklist and returning it to Identiv Technical Support.

3. Running the **Pre-Upgrade Script** and returning the output generated to Identiv Technical Support.

4. The upgrade .bin file will be provided after the checklist has been reviewed and approved by Identiv Technical Support.

Pre-Upgrade Assessment Checklist - Objective and Scope

This document provides a discovery checklist to help assess the effort and scope of a requested customer migration (from the Cisco CPAM to Identiv ICPAM). The objective is to work pro-actively with customers to analyze the information and make informed decisions:

- Determine any required hardware upgrade needs to support the software migration.

- Recommend appropriate Professional Services Group (PSG) services to assist with the migration (pertinent for implementations with previous customization or advanced integration work).

- Identify any other action items required to ensure a successful migration.

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This checklist is formatted with respect to the following categorical areas:

- Basic Information
- Customer Policy and Procedures
- Environment
- Technology and Product (Hardware, Software, Licenses)
- Feature Utilization (e.g. Key/critical functionality deployed)
- Integrations
- Customization and Patches (e.g. historical custom work or patches deployed)
- Data Archiving and Recovery
- Support Levels and Tickets
- Customer Operations and Administration
- Training

*For those end-users who elect to have Identiv perform their migration from CPAM to ICPAM via the **Upgrade as a Service** option, please make sure to contact your Channel Manager regarding the additional steps after completing this pre-assessment checklist.*

**Upon completing this checklist, please send to
Identiv's ICPAM Technical Support Team at support_icpam@identiv.com.**
If you have any questions, please contact technical support
or visit support.identiv.com/icpam/

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Basic Information

End-User

Company Name: _____

Contact Email: _____ Contact Phone: _____

Alt. Email: _____ Alt. Phone: _____

Customer Location for CPAM Installation

City: _____ State: _____

Partner

Company Name: _____

Contact Email: _____ Contact Phone: _____

Alt. Email: _____ Alt. Phone: _____

Company Location

City: _____ State: _____

Form Completed By

Contact Name: _____

Contact Email: _____ Contact Phone: _____

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Please budget time for planning prior to your desired migration date

to enable Identiv to review and work with you on your successful migration.

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Customer Policy and Procedures

General

Are there any pre-production requirements such as testing requirements in a lab setting? **(It is highly recommended that you do a test upgrade in the lab)**

Yes ☐   No ☐

If Yes, specify the type and duration of testing:

_____

System Access Permission Requirements

Will you allow Identiv to remotely access your system for assistance or troubleshooting?

Yes ☐   No ☐

Timeframe

Any timeline constraints or target/desired schedule for migration?

Yes ☐   No ☐

If this is a critical schedule target, provide detailed reasons:

_____

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Customer Policy and Procedures (continued)

Reason for Upgrade

What are your main reasons for upgrading at this point in time?

_____

_____

Expanding/adding new hardware

Yes ☐   No ☐

Latest ICPAM software resolves a bug in current CPAM software

Yes ☐   No ☐

If Yes, which bugs:

_____

Other (If Other, please specify):

_____

Number of Upgrades

Please specify the number of CPAM instances that will be upgraded: _____

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Environment

Environment Specifics

Existing Number of Doors Managed by CPAM? _____

Any previous challenges with your CPAM deployment that Identiv should be aware of?

Yes ☐   No ☐

If yes, please provide details:

_____

_____

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Technology and Product

Please verify compatibility and capacity of your existing implementation
(software and hardware) to determine if any changes are required prior to upgrade.

Existing Hardware

Number of gateways deployed (CIAC-GW-K9): _____

Number of other Cisco Physical Access modules deployed:

CIAC-GW-OP8: _____   CIAC-GW-IP10: _____   CIAC-GW-RDR: _____

Number of badges in system: _____

Number of computers running CPAM Client: _____

Current Servers: Physical ☐   or   Virtual ☐

Please specify quantity and model:

_____

Existing Software and Versions

CPAM Software version(s) currently deployed:

_____

Base OS: 32-bit ☐   or   64-bit ☐

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Technology and Product (continued)

Expansion Requirements

Any additional hardware required today with the migration activity?

Yes ☐   No ☐

Any additional hardware required in near-term plans after the migration activity?

Yes ☐   No ☐

If yes to any of the above, please provide details:

_____

_____

Do you expect to expand any current hardware to meet minimum physical
or virtual requirements?

Yes ☐   No ☐

Do you have VMWare ESXi deployed in your Virtual Environment?

Yes ☐   No ☐

If yes, what version? _____

Minimum Physical/Virtualization Requirements for Expansion:

16GB of RAM, 4 vCPUs, 500GB Hard Drive, 2 Virtual 1000BASE-T Network Interfaces,
VMWare vSphere 5.x or 6.x hypervisor to host the appliance

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Technology and Product (continued)

Licenses

Which active licenses are currently applied?

HA utilization	Yes ☐	No ☐
EDI utilization	Yes ☐	No ☐
CPAM WEB API	Yes ☐	No ☐
CPAM Badge Designer	Yes ☐	No ☐

Are there any other licenses besides what is listed above that we should be aware of?

Yes ☐   No ☐

If yes to any of the above, please provide details:

_____

_____

Are license files stored locally or in a central location?

Local ☐   Central ☐

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Feature Utilization

Feature Specifics

Which features are most utilized and critical for end-user functionality?

Elevator Control	Yes ☐	No ☐
Anti-Passback (APB)	Yes ☐	No ☐
Mustering	Yes ☐	No ☐

If there are any other key features to be aware of, please list them below:

_____

Do you utilize more than one reader module per door?

Yes ☐   No ☐

How many access policies do you have assigned per Cisco Gateway?   _____

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Credentials and Readers

Credential Specifics

Which technology is used? Please select all that apply.

Proximity ☐   MiFARE ☐   DESFire ☐   Other ☐

If other, please specify: _____

Which PACS format? Please select all that apply.

26 bits ☐   33 bits ☐   34 bits ☐   35 bits ☐

36 bits ☐   37 bits ☐   48 bits ☐   Other ☐

If other, please specify the format, technology and vendor used today:

_____

Readers

What type of reader do you use today? Please list vendor and model.

_____

Do you intend to continue using these readers?

Yes ☐   No ☐

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Credentials and Readers (continued)

Cards

Do you expect to buy new cards?

Yes ☐   No ☐

If yes, what kind? _____

Do you expect to buy new readers?

Yes ☐   No ☐

If yes, what kind? _____

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Integrations

Integration Specifics

Does your CPAM implementation integrate with any of the following products?

Cisco VSOM   Yes ☐   No ☐

Cisco Call Manager   Yes ☐   No ☐

IP Phone Integration   Yes ☐   No ☐

CPAM Web Services APIs   Yes ☐   No ☐

Direct access to CPAM server database   Yes ☐   No ☐
(database views)

EDI Integration   Yes ☐   No ☐

If yes, with which products or databases? _____

EDI extensions   Yes ☐   No ☐

If yes, for what purpose? _____

Are there any other product integrations that would be helpful to know prior
to migration? (e.g. Utility Tools, Custom scripts, Morpho Biometrics, etc.)

Yes ☐   No ☐

If yes, please describe integrations:

_____

Do you have VMWare ESXi deployed in your Virtual Environment?   Yes ☐   No ☐

If yes, what version? _____

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Customization and Patches

Customization and Patch Specifics

Have you implemented any custom work or customer-specific work to the end-system?

Yes ☐   No ☐

If yes, please specify:

_____

Any custom database views provided by Cisco?

Yes ☐   No ☐

If yes, please specify:

_____

Any custom reports provided by Cisco?

Yes ☐   No ☐

If yes, please specify:

_____

Any custom integration work?

Yes ☐   No ☐

If yes, please specify:

_____

Any previous software patches applied to the end-system?

Yes ☐   No ☐

If yes, please specify:

_____

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Data Archiving and Recovery

Archiving Policies

What is your policy for Event history retention? (e.g. 30 days, 90 days, etc.)

_____

What is the method and frequency for archiving data?

_____

Do you archive all data?

Yes ☐   No ☐

If not, please elaborate:

_____

Where do you store archived data?

_____

Recovery Policies

How accessible is your backup and archived data?

Very Accessible ☐   Somewhat Accessible ☐   Difficult to Access ☐

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Support Levels and Support Tickets

Existing Support Levels

Do you have an existing SmartNet contract with Cisco?

Yes ☐   No ☐

If yes, what does this cover?

Hardware   Yes ☐   No ☐

Software   Yes ☐   No ☐

SLA Level: _____

When does your SmartNet contract expire? _____

Are there any existing or open escalations or critical support tickets that need to be addressed prior to the migration?

Yes ☐   No ☐

If yes, please specify:

_____

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Operations and Administration (continued)

Please answer the following questions based on your role.

Partner Questions

What level of service/support activities do you provide to the end-user?

High ☐   Medium ☐   Low ☐

What level of training do you provide to the end-user?

High ☐   Medium ☐   Low ☐

Do you have a service or support agreement in place with the end-user?

Yes ☐   No ☐

Who did the install? _____

Have you experienced any installation problems affecting your current CPAM system?

Yes ☐   No ☐

If yes, please specify:

_____

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Operations and Administration (continued)

Please answer the following questions based on your role.

End-User Questions

Who provides service/support?

_____

What level of support is provided today?

High ☐   Medium ☐   Low ☐

Do you have a service or support agreement in place with anyone?

Yes ☐   No ☐

Who did the install? _____

Have you experienced any installation problems affecting your current CPAM system?

Yes ☐   No ☐

If yes, please specify:

_____

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Training

ICPAM/EM-100 Online Course

The ICPAM/EM-100 online course is strongly recommended as a prerequisite prior to any upgrade. Would you like to receive information about this course?

Yes ☐   No ☐

For Partners

Has the primary point of contact working with the end-user completed any previous ICPAM training?

Yes ☐   No ☐

If yes, please specify: _____

For End-Users

Has anyone completed any previous ICPAM training?

Yes ☐   No ☐

If yes, please specify: _____

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Questions or Comments

Do you have any questions or additional comments? Please elaborate here.

_____

_____

_____

_____

_____

_____

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