

# **SHIFT CLOUD**

**Next Pathway Inc.** 

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# **User Guide**

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# Chapter

1

# **About SHIFT Cloud**

**SHIFT Cloud** is a SaaS offering, developed by **Next Pathway Inc.**, that automatically translates legacy code to a variety of cloud targets.



The coverage for **SHIFT Cloud** is continuously improving; currently **SHIFT Cloud** supports the following Source/Target combinations:

SOURCE	CLOUD TARGETS					
<u>SYSTEMS</u>		AWS Redshift	SparkSQL	Azure Data Factory		
Netezza	<b>√</b>	✓	✓		✓	

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Teradata	✓	✓	✓	✓		
SQL Server	✓		✓			
Oracle	✓		✓			
DB2	✓	✓	✓			
HIVE	✓		✓		✓	
SSIS						<b>√</b>
DataStage						<b>√</b>

ALL SOURCE SYSTEMS MUST BE VERSIONS THAT ARE ABLE TO BE MIGRATED TO THE CLOUD.



# SHIFT Cloud encompasses four modules: Upload | Analyze | Translate | Configure



① Upload:	This function manages the code intake process of importing SQL and ETL code into SHIFT Cloud Libraries [5] from your legacy sources.
์กัก Analyze:	This function will scan through your source files and create a report (Analyzer Report). The Analyzer Report documents the number and type of legacy objects in the source files and the expected outcome of the translation based on your selected cloud target.
<b>ᢟ</b> Translate:	Once you receive the <b>Analyzer Report</b> , the next step is to initiate code translation. The <b>Translate</b> module will execute the translation of the source code to your selected cloud target. The results are displayed <b>side-by-side</b> and <b>combined view</b> of source to target platforms. The translated files can also be downloaded.
<b>©</b> Configure:	Role Based Access Controls including the ability to add/remove users, assign role permissions and create/remove projects and client spaces.



# **Chapter**

# 2

# The SHIFT Cloud Workflow

**SHIFT Cloud** translates code in 3 steps: **Upload | Analyze | Translate**:



Select your source files that comprise the legacy system that you want to migrate to the cloud.

Files are organized by
Projects and Library's within
Projects. A single Project can
contain multiple Library's —
allowing you to organize your
legacy system into groupings
of source files.

Select your cloud target for the files in each Library, then select **Upload** to start the upload process.

When your files are loaded, select **Analyze**.



The Analyze feature will create an Analyzer Report for each Library. The Analyzer Report will provide:

- 1. An overview of the full composition of your source files by object type and by line count.
- 2. The expected translation results based on your selected cloud target.

The Analyzer Report can be viewed online and downloaded.

If you are satisfied with the expected translation result, select **Translate**.



Your files within the Library will be translated to your cloud target.

You can observe the status of your translation.

Once the translation is finished, you will receive a notification.

You can view the side by side comparison of your source and translated files, line by line, online. And have the option to download your translated files.

Access to SHIFT Cloud is managed through a robust Role Based Access Control

shift\_support.np@nextpathway.com

# SHIFT Cloud Version 1.0 Software Functionalities Pupper Upload TRANSLATE TRANSLATE START HERE & FOLLOW # -> 1. Create a Project



4. Select the Project Assigned to you	10. Trigger Code Analysis	14. Trigger Code Translation	2. Add Users to SHIFT Cloud
5. Review the Best Practices for submitting ETL/SQL to SHIFT Cloud	11. View Code Analysis List with Status of Progress	15. Review Pricing for Code Translation	3. Review the List of User Roles and Permissions
6. View the List of Source Systems and Target Platforms Supported in SHIFT Cloud	12. <u>View / Download</u> <u>Analyzer Report</u>	16. View Code Translation List with Status of Progress	
7. <u>Create a Library</u>	13. <u>View Source</u> <u>Statement Breakdown</u> <u>of the Analyzed ETL/SQL</u> <u>Code</u>	17. View / Download Translation Report	
8. <u>Upload ETL/SQL Code</u> <u>to Library</u>		18. View Statement Breakdown in 'side by side' and 'combined' view	
9. Troubleshoot Code Import Error			19. Edit Existing User Roles & Clients
			20. Edit Projects



SHIET Cloud USER GUIDE Chapter

3

# **Getting Started**



The **SHIFT Cloud Administrator** from Next Pathway will grant access to the SHIFT Cloud application by creating a **Client Space**<sup>[3]</sup> for your organization. In addition, an individual in your organization will be designated as the **Client Administrator**<sup>[2]</sup> with administrative access rights.

The Client Administrator<sup>[2]</sup> will follow these steps to enable the translation of legacy code:

- 1. Create a Project.
- 2. Assign Users with rights within each Project.
- 3. Invite Project Users to Sign-in and start.



# **STEP 1 - Create a Project**

Prior to uploading your source files, create a Project. **Projects** are "workspaces" for specific migration initiatives.

A BEST PRACTICE IS TO CREATE A PROJECT FOR EACH UNIQUE SOURCE SYSTEM (DATA WAREHOUSE OR DATA LAKE) THAT IS SCHEDULED FOR MIGRATION TO THE CLOUD.

**Project** workspaces consist of multiple **Libraries**<sup>[5]</sup> containing SQL and ETL code files imported from a specific legacy data warehouse or data lake.

The **Project** workspace gives a clear overview of each data source, including *platform*, *library name*, *objects count*, *created date*, and *created by*.

i) The Client Administrator<sup>[2]</sup> is the only role that can create a Project in SHIFT Cloud by following the instructions below:



- Click Configure.
- Select "Projects Setup".
- Click the "+ Add Project" button.
- Click "Edit" to manage project details.

You can manage the following details on the **Projects Setup** page as per your role type and permissions:



- Name of the Project: The description of the SHIFT Cloud Project workspace.
- Clients assigned:
- Created user: The profile name of the user who created the Project.
- Created date: The date and time when the user created the new Project.

To delete/rename a project in SHIFT Cloud, click "Edit" on the **Projects Setup** page of the **Configure** module.

## Select the Project Assigned to you

The SHIFT Cloud users can switch between different Projects by clicking the **Folder** icon on the top right corner of the **Main Dashboard** to view the drop-down list of Projects and click to select, e.g., *Production*-



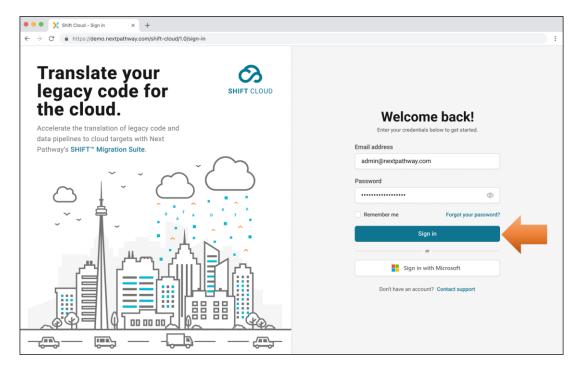


# STEP 2 - Assign Users with Rights within each Project

The **Client Administrator**<sup>[2]</sup> has permission to add Users on SHIFT Cloud and assign roles and permissions. These roles can create **Libraries**<sup>[5]</sup>, **Upload** code, and trigger the **Translate** functions.

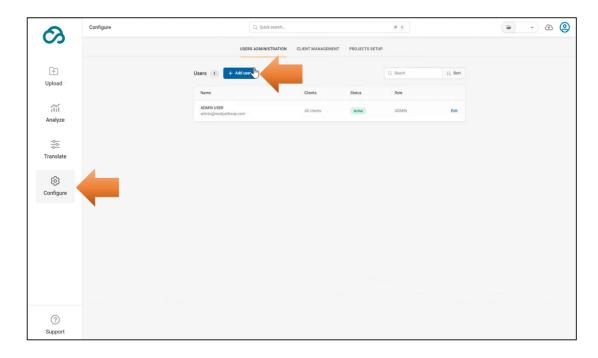
#### To add a new user, follow the instructions below:

a. Use the SHIFT Cloud sign in page on www.nextpathway.com/shift-cloud/1.0/sign-in to enter your credentials, i.e., email address and password, and then click "Sign In".

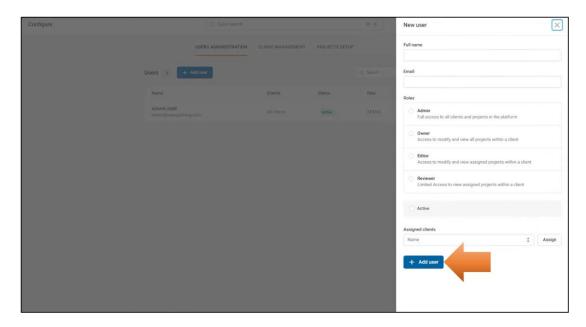




b. Select **Configure** and click "+ Add user".



c. Fill out the listed fields to add new users, such as *Full name*, *Email*, *Roles*, *Status* (click active), and *Assigned clients*. Click "+ Add user".







Within each Project, **User Roles** are assigned as follows:

PROJECT USER ROLES	PERMISSIONS ON SHIFT CLOUD
CLIENT ADMIN (Project	<ul> <li>Serves as the platform administrator with full access to all clients and projects.</li> </ul>
Administrator)	<ul> <li>Able to create Client Space and Projects for Client Owners.</li> </ul>
	<ul> <li>Manages Project Spaces for client translation projects.</li> </ul>
PROJECT OWNER	<ul> <li>Access to create other Client Owners, Project Editors, and Project Reviewers.</li> </ul>
	<ul> <li>Able to create Analyze Reports and Translate code for all projects on behalf of a client.</li> </ul>
	<ul> <li>Configures Project Libraries within his/her Project Space.</li> </ul>
	<ul> <li>Able to Upload code, run the Analyze Reports and Translate code.</li> </ul>
PROJECT EDITOR	<ul> <li>Able to create Analyze Reports and Translate code within his/her Project Space.</li> </ul>
	<ul> <li>Access to manage only the assigned projects within a client.</li> </ul>
PROJECT REVIEWER	<ul> <li>Able to review the information contained within the Project; including uploaded source code, Analyzer Reports, and Translated code output.</li> </ul>

<sup>(</sup>i) THE CLIENT ADMINISTRATOR CAN ASSIGN MULTIPLE EDITORS AND REVIEWERS PER PROJECT.

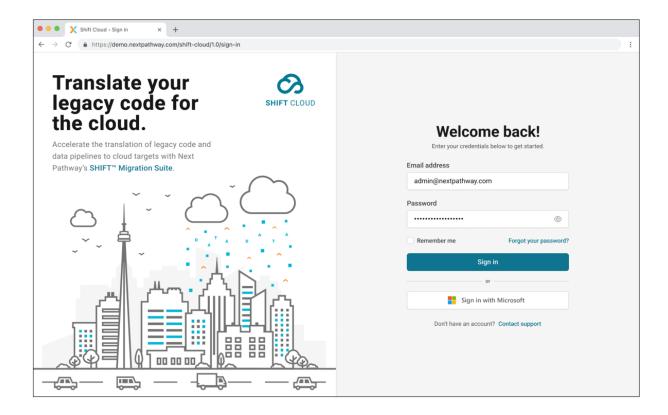
# **STEP 3** – Invite Users to Sign-in and Start

The SHIFT Cloud users will receive a "Welcome" email containing instructions to log-on and reset their password.

it is the client administrator's responsibility to create the reviewer role for him/her to be able to view the information.

To login, go to www.nextpathway.com and click SHIFT Cloud Login. Enter your email address and password and then click "Sign In".





# **Changing your password**

To change your password, follow these instructions on the SHIFT Cloud sign in page:

- a. Click on "Forgot your password?"
- b. A window will pop up prompting for your email address.
- c. Enter your email address.
- d. Click "Reset Password". An email will be sent with the new password.



Chapter

4

# **Starting the Code Intake Process**

# **IN PROGRESS**



The purpose of the **Code Intake process** is to import legacy source code (ETL and SQL code) into SHIFT Cloud.

Before initiating the code intake process, please review the best practices for submitting code to SHIFT Cloud to begin the code analysis process.

(i) ONLY THE ADMIN, OWNER AND EDITOR USERS ARE ALLOWED TO UPLOAD DATA FILES TO SHIFT CLOUD.



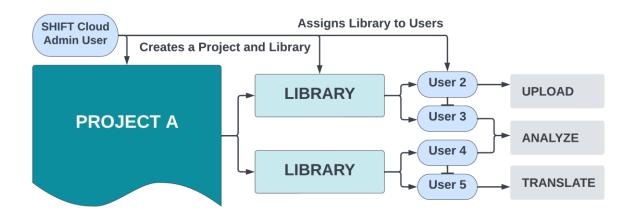
# Best Practices for submitting ETL and SQL to SHIFT Cloud (old information)

- Make sure your code is valid.
  - o Ensure there are no typographical errors.
  - Ensure all code is in the source language.
- If extracting the SQL from elsewhere, ensure comments, variables, etc. are all valid SQL.
   Properly replace all variables with the full SQL. For example, SELECT \* FROM \* WHERE \$CONDITION; --> SELECT \* FROM \* WHERE A = B;
- Try running your source code before submitting it to ensure it is valid code.
- ➤ Don't include random files. We treat everything uploaded as viable code.
  - Attempting to assess a README.md or a Hello.txt file will show up Syntax errors on the final report. These are the equivalent of "Invalid SQL" and will muddy the results.

# **Upload Code using SHIFT Cloud**

The SHIFT Cloud **Owner** and **Editor** will have access to start the code import process using the **Upload** command after the **Client Administrator** has assigned users with rights within each Project.

The admin must first create a Project within which multiple libraries can be created and assigned to different users.



Read the chapter <u>Create a Project</u> and then follow the instructions below to create a **Library**<sup>[5]</sup>, which will serve to store the files in the **Upload** module.

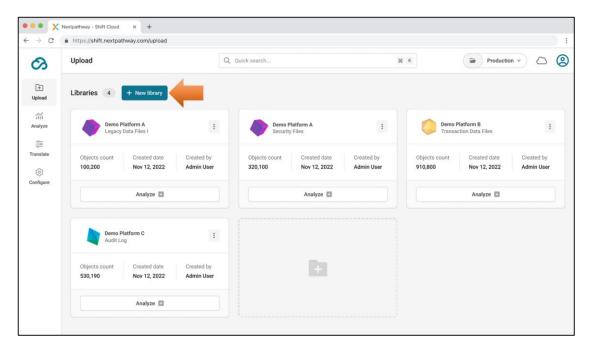


The registered user must first select the Project on the top right-hand side corner of the **Main Dashboard** within which the new Library will be created.



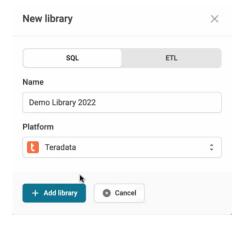
# **Create a Library**

a. Click Upload on the left-hand side of the main dashboard and then click the "+ New library" button.

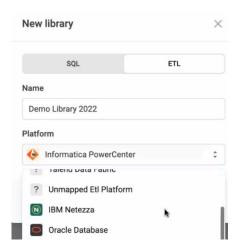




**b.** Select code type—**SQL / ETL** and review the "best practices" section above before submitting the import code request.



c. Enter **New Library Name**, select the supported **Platform**<sup>[6]</sup> (for migrating data warehouse) from the drop-down list, and then click **"+ Add library**".



d. To delete a **Library**<sup>[5]</sup>, click the options icon as shown in the screenshot below and select "Delete library".

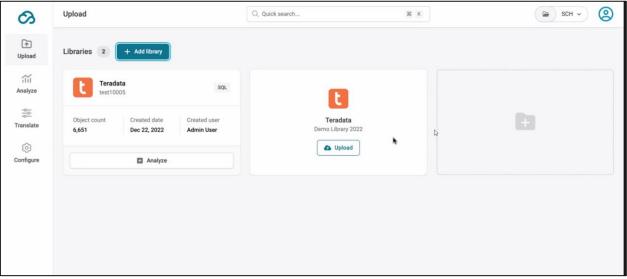




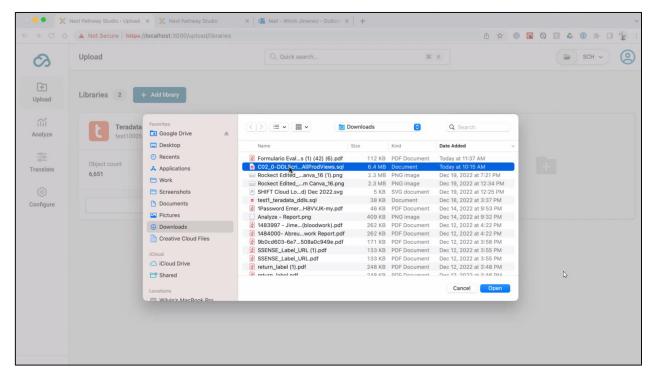


# **Upload Code to Library**

Once a **Library**<sup>[5]</sup> is created on the main dashboard, the user will be able to see the "**Upload**" button option under the new library name, e.g., *Demo Library 2022 Teradata* in the screenshot below.



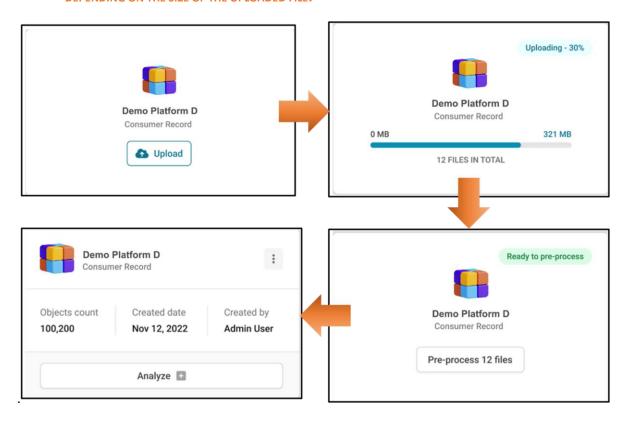
To import code to the selected platform<sup>[6]</sup> within a Library, click the "**Upload**" button. This will prompt the user to select the legacy data files from his/her local drive. Click "Open" to proceed.





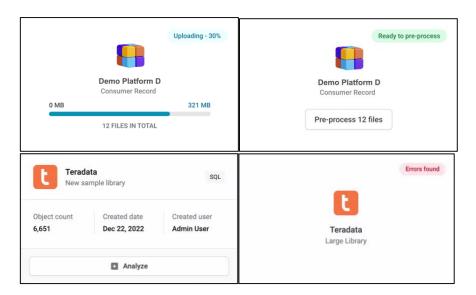
This will start the code intake process after you select the ETL and SQL code database files from your legacy data environment source to the target platform<sup>[6]</sup>. Read more on

i Please allow a few minutes for the server to split the selected code for a successful view of details on object count, created date, and created user. This process is time-consuming depending on the size of the uploaded file.





# **STATUS OF CODE IMPORT**



- 1. Uploading
- 2. Ready to pre-process
- 3. **Complete:** The user can click the "Analyze" button to trigger the code analysis of the source data
- 4. **Error Found:** For errors found, {UI not available}

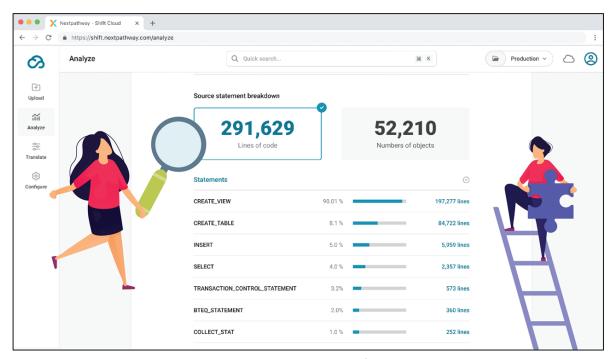


Chapter

5

# **Analyze Code**

SHIFT Cloud USER GUIDE



The registered SHIFT Cloud users will have access to the **MANALYZE** module with specific rights to trigger code analysis, download **Analyzer Report**, and view the progress of code analysis.

The **MANAIYZE** feature allows the users to view the orchestrated output layers, which comes with an automated **source statement breakdown** of the **Analyzer Report**. This source statement breakdown lists the **Exceptions** – code objects that could not be translated by SHIFT Cloud to your selected cloud target.

These statements can be viewed for various **projects**, which can be selected on the top right-hand side corner of your SHIFT Cloud dashboard.





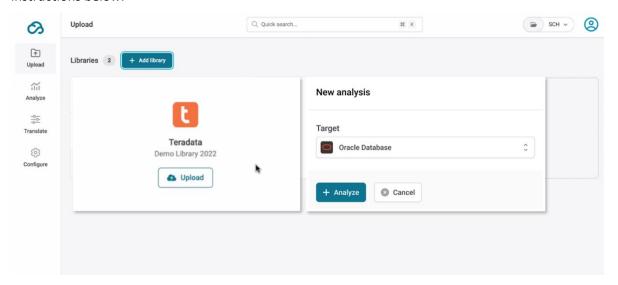






# **How to trigger Code Analysis**

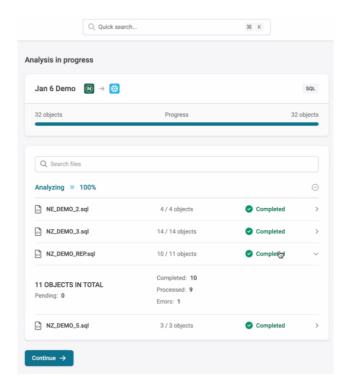
The SHIFT Cloud **Owner** and **Editor**<sup>[4]</sup> can trigger an analysis of the uploaded code by following the instructions below:



- a. Select the **Project** on the top right-hand corner of your main dashboard.
- b. Click **Dupload** to view the grid-view list of **Libraries** [5] for supported platforms [6].
- c. Import data files from the supported platform source to the target library by selecting "Upload files".
- d. Select the code target on the "new analysis" pop-up and click the "Analyze +" button.

You will be able to view the progress bar with the total number of objects within each file. The files containing "Errors" have objects that could not be analyzed in SHIFT Cloud.



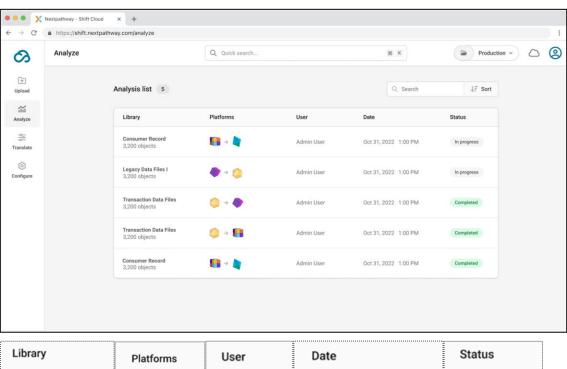


Please contact the SHIFT Cloud **Support Team** if you have any inquiries regarding the progress of code analysis.



# **View Code Analysis List**

The **Editor** and **Reviewer** can view the code **Analysis List** on **Minimalyze** dashboard containing an overview of the following:





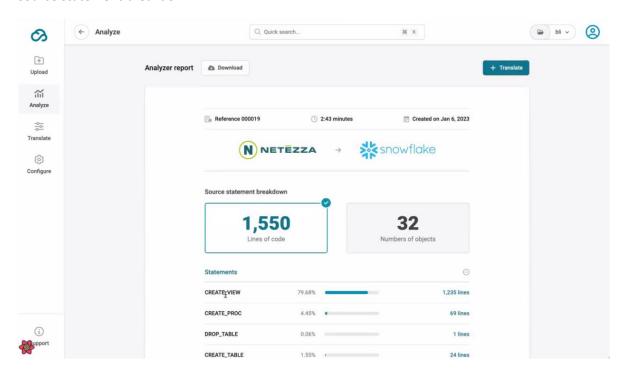
- Library: Code description and the total number of objects within the code source file uploaded by the SHIFT Cloud user. The library will appear on the Analyze dashboard once the user clicks the "Analyze" button on the Library menu of the Upload module. To create a Library to preprocess data to SHIFT Cloud from a data lake source, click here.
- Platforms: Source and target data lake Platforms<sup>[6]</sup> selected by SHIFT Cloud user for the three SHIFT Cloud processes Upload, Analyze and Translate. The user must first create a Library in the Upload module to preprocess the legacy data files from the source to be made ready for analysis and translation in SHIFT Cloud. View instructions on how to trigger code analysis here.



- User: The profile name of the user who clicked the "Analyze" button on the Library menu of the Upload module. Not all SHIFT Cloud users can trigger analysis, read more on Project User Roles.
- Date: The date and time when the user executed the code analysis by clicking the "Analyze" button on the Library menu of the Dpload module.
- Status: In progress, under review, completed, or failed.

## **View / Download Analyzer Report**

The **Editor** and **Reviewer** can download the **Analyzer Report** on the **Manalyze** dashboard once the code analysis is complete. Click the "Download" button to export an analyzer report containing a source statement breakdown.



# View Source Statement Breakdown of the Analyzed ETL/SQL Code

**MANALYZE** will break down the source code and show the expected results of the code translation to the selected cloud target. In addition to executing the source code breakdown, this report will also show **exceptions** and organize the exceptions into categories.

**Exceptions** are code objects that could not be translated by SHIFT Cloud to your selected cloud target; the rationale associated with each exception is included in the category description.

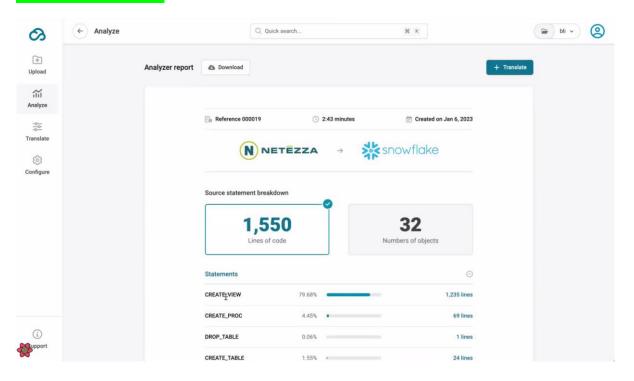


# Chapter Chapter

To view the source statement breakdown, the **Owner** and **Editor** must first trigger the code analysis in the **Deliver** must first trigger trigger trigger trigger must first trigger must first trigger trigger must first trigger must

# **Translate Code**

# **IN PROGRESS**

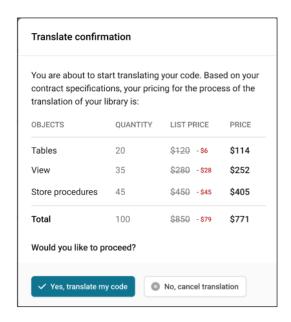


The SHIFT Cloud **Owner** and **Editor** can translate their legacy source database after the analysis process is complete in the **Manalyze** module. The users will see the "+Translate" button after the source code is ready

**Translate will** perform the translation of code to the selected cloud target.

Once the translation is completed, there are various views available: "side-by-side" and "combined". **Side by Side** view displays the source code on the left panel and the translated code on the right panel. The **Combined** view shows each source line of code, followed by the translation of that line to the cloud target.

Only an Editor can initiate code translation. Before translation is initiated, SHIFT Cloud will display the pricing details for the translation of the files contained in the **Library**<sup>[5]</sup>.



#### **Downloade Code Translation Files**

<HOW WILL THEY KNOW THEIR FILES HAVE BEEN TRANSLATED AND ARE READY FOR PICKUP?>

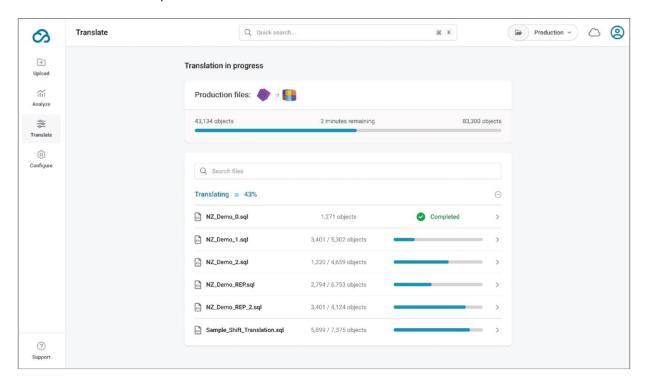
The **Editor** and **Reviewer** can download a copy of code translation files on the **Translate** dashboard by following the steps below:

- a. Select the  $\mathbf{Library^{[5]}}$  from the list of "Translations" on the  $\mathbf{\overset{\bullet}{\sim}}\mathbf{Translate}$  module.
- b. Click "Download files" to export the translation reports to your local drive.
- c. Check your download folder for files.

# **View Code Translation Library and Status**

Click **Translate** on the main dashboard to view the complete list of translation libraries on SHIFT Cloud.

A preview of current **Libraries**<sup>[5]</sup> will be displayed with the total number of **objects** within each legacy data warehouse source platform. The status of each code translation is available from this dashboard.



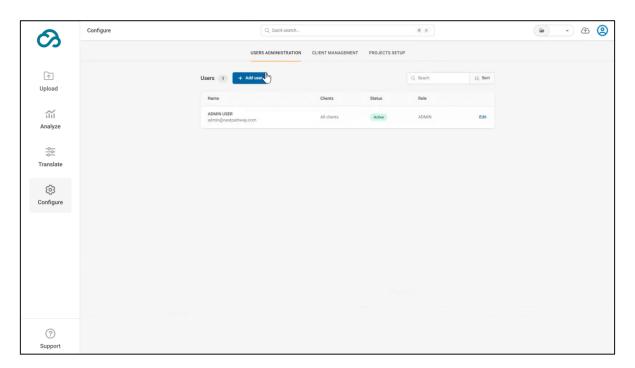
# Chapter

7

# **Configure: Role Based Access Control**



#### **User Administration**

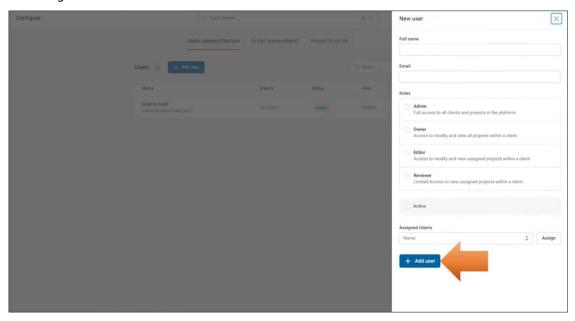


#### **Create new user roles**

The Project Administrator has access to create new user roles in the **Configure** module of the SHIFT Cloud web application. To begin,

a. Click the "+ Add user" button as shown in the screenshot above.

b. Fill out the listed fields to add new users, such as *Full name*, *Email*, *Roles*, *Status* (click active), and *Assigned clients*. Click "+ Add user".



The Project Admin can assign the following role permissions to the new users while generating a "Welcome" email. This email notification to join will be triggered once the admin clicks "Add user".

PERMISSIONS ON SHIFT CLOUD

**PROJECT USER ROLE** 

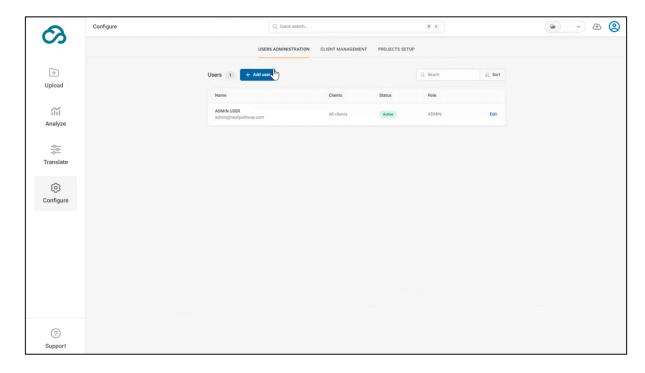
# Serves as the platform administrator with full access to all clients and **CLIENT ADMIN (Project** projects. Able to create Client Space and Project for Client Owners. Administrator) Manages Project Spaces for client translation projects. Access to create other Client Owners, Project Editors, and Project Reviewers. **PROJECT OWNER** Able to run the Analyze Reports and Translate code for all projects on behalf of a client. Configures Project Libraries within his/her Project Space. Able to Upload code, run the Analyze Reports and Translate code. Able to run the Analyze Reports and Translate code within his/her **PROJECT EDITOR** Project Space. Access to manage only the assigned projects within a client.

**PROJECT REVIEWER** 

 Able to review the information contained within the Project; including uploaded source code, Analyzer reports, and Translated code output.

# **Edit existing user roles and clients**

Only the Client administrator can edit existing user roles on the **Users** list, which is available in **© Configure** on the **User Administration** page.

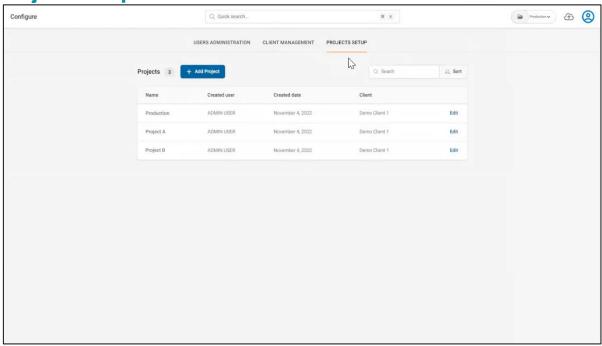


To edit the name, clients, and assigned role of an existing user, click the "Edit" button on the Users list.

# **Client Management**

- 1. Add new clients with ETL Platforms and Projects
- 2. Edit existing clients

# **Projects Setup**



- 1. Add new projects
- 2. Edit existing project details –name, and client



# **Getting Support**

**SHIFT Cloud** is supported by Next Pathway's Technical Support team.

The team is available by phone, chat, or email.

1-855-980-1690

Our Support Team is available 24 hours, Monday to Friday.

# Chapter

9

# **Glossary of Terms**

#### **Analyzer Role**

**Analyzers** are the SHIFT Cloud users who have the rights and role permissions to access UI features within the **Analyze** workflow to generate **Analyzer Reports**. The **Analyzer** role executes the following tasks in SHIFT Cloud:

- Trigger code analysis
- Select code Target Platform for migration
- Generate and download Analyzer Reports
- View Source Statement Breakdown of Analyzer Report
- View Code Exception Categories list for errors

Skip to the Chapter Analyzing Code | Software Functionalities Table

#### **Client Administrator**

An Individual assigned to an organization with all the access rights to manage a client space in SHIFT Cloud. The **Administrator** is the only user type that has access to the **Configure** module to **Add Users**, assign **Roles** and **Projects** to new users, and manage other configurations required for all SHIFT processes – **Upload**, **Analyze** and **Translate**. A client space can support more than one client administrator.

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#### **Client Space**

A **Client Space** is a centralized architectural space within SHIFT Cloud consisting of registered users, code database libraries, data migration projects, corporate clients, and other code migration tools for managing user workflow for all SHIFT processes – **Uploading**, **Analyzing** and **Translating**.

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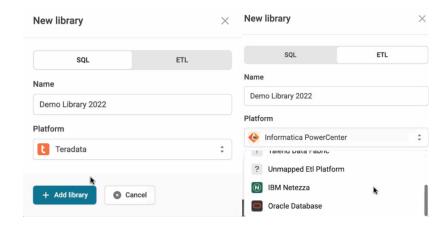
#### **Editor Role**

- Configures Project Libraries within his/her Project Space.
- Able to preprocess code, run the Analyze Reports, and Translate code.

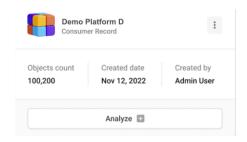
- Able to run the Analyze Reports and Translate code within his/her Project Space.
- Access to manage only the assigned projects within a client.

#### Library

A feature within the **Dupload** module that allows the **Client Administrator** to select the **Source Platform** and import legacy files –SQL and ETL to SHIFT Cloud for preprocessing.



The **Client Administrator** can view the **libraries** list for details on the following:



- Objects count: The total number of instances within a data frame containing lists and tables of a categorized collection of imported code.
- Create date: The date when the user created the existing library.
- Created by: Name of the user who created the existing library.

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#### **Platform**

Physical and cloud-based space which stores the SQL and ETL code files. In SHIFT Cloud, we speak of two sides of a platform within the public cloud migration —**source** and **target**, which are supported in our product UI for clients' migration needs.

 Source: Legacy data warehouse or data lake containing SQL and ETL code files which are uploaded in SHIFT Cloud by the Client Administrator. The source data serves the analysis and translation needs of the SHIFT Cloud user to be made ready for migration to the target

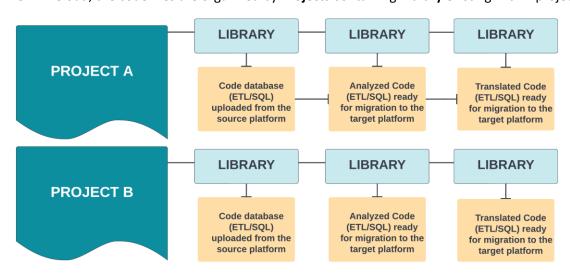
- **Platform**. Go to the Chapter <u>About SHIFT Cloud</u> | <u>Importing Code to Supported Platform</u> | Viewing Code Analysis List
- Target: Datawarehouse containing ETL tools that extract the code analyzer and translation reports from SHIFT Cloud to serve the clients' enterprise data warehousing and big data analytics needs.

**Supported Target Platforms in SHIFT Cloud** 

SOURCE	TARGET
NETEZZA	Snowflake, Google BigQuery, Azure Synapse
TERADATA	Snowflake, Google BigQuery, AWS Redshift, Azure Synapse
MICROSOFT SQL SERVER	Snowflake, Azure Synapse
ORACLE	Snowflake, Google BigQuery, Azure Synapse
DB2	Snowflake, Azure Synapse, Google BigQuery, AWS Redshift
HIVE	Snowflake, Google BigQuery, AWS Redshift, Spark SQL
SSIS	Azure Data Factory
DATASTAGE	Azure Data Factory

#### **Project**

In SHIFT Cloud, the code files are organized by **Projects** containing **Library** existing within projects.



A single Project can contain multiple Libraries allowing you to organize your legacy system into groupings of source files. The **Client Administrator** must first create a Project in **Projects Setup** and then assign it to the SHIFT Cloud users to execute SHIFT Cloud processes — **Upload**, **Analyze** and **Translate**. The users can switch between different Projects by clicking the **Folder** icon on the top right

corner of the Main Dashboard to view the drop-down list of Projects.



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#### **Reviewer Role**

A **Reviewer** executes the following tasks in SHIFT Cloud:

#### **Translator Role**

SHIFT Cloud users who have the rights and role permissions to access the UI features within the **Translate** workflow to generate **Translation Reports** for other code migration processes, such as Bigdata code analytics. A **Translator** executes the following tasks in SHIFT Cloud:

- Trigger code translation
- Select code Target Platform for migration
- View and approve code Translation Pricing
- Generate and download Translation Reports
- View Source Statement Breakdown of the translated code
- View Code Exception Categories list for errors

Skip to the Chapter <u>Translating Code</u> | <u>Software Functionalities Table</u>