

Inforum 2007

Presentation 1100 Data Migration



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DATA MIGRATION

The *Other* Part of the Implementation



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September 2007

DATA MIGRATION PLANNING

- **Resources**
- **Expectations**
- **What Needs to be Migrated?**
- **How will Data be Migrated?**
- **'Core' Migration**
- **Data Translation /Conversion**
- **Customizations and Data Migration**
- **'Cleansing' the Data**
- **Data Validation**

PLANNING YOUR DATA MIGRATION

- Make it easy . . . use the right tools.
- Data migration readiness . . . are you ready?
- How soon can I use MY data?
- Incorporate data migration into overall ERP_{LN} implementation schedule
- Schedule data refreshes to coincide with key project events (pilot testing)
- Involve key users who 'know' the data
- Validate, validate, validate

RESOURCES

Identify resources early in the process

- Implementation Team
- Project Manager
- Power Users
- Key Functional Users
- End-user Trainers

Define expectations for each resource group

DATA EXPECTATIONS

Different Expectations from Different Groups

- Management
- Project Team
- Business Users



Manage Expectations Early

Manage Expectations Often

**Manage Expectations
Throughout the Project**

WHAT DATA NEEDS TO BE MIGRATED?

- Master Data
- Open Transactions
- History
- Where are the sources of data?

WHAT DETERMINES THE DATA THAT WILL BE MIGRATED?

- Data Migration Tools Include 'Core' Data
- Business Requirements
- Decision Makers
- How will 'old' data be accessed?
- Cost

HOW WILL DATA BE MIGRATED?

- Manual versus Automated
 - Most data is easy to migrate using automated tools
 - Some data must be entered manually
- Should any data be excluded?

CORE DATA TO BE MIGRATED

- Master Data
 - Warehouses, Items, Customers, Vendors, Addresses, Chart of Accounts, Inventory, Locations, Work Centers
- Production Data (where process & order life cycle match)
 - Sales Orders, Purchase Orders, Work Orders
- Any additional data required for referential integrity
 - Item Groups, Product Class, Order Types, Statistical Groups

DATA TRANSLATION

Definition:

Give MK Data New Values in ERP_{LN}

Why convert data values?

- Improve business processes
- Improve reporting
- If not done now then when?

DATA TRANSLATION

Identify what needs new values

Examples:

- Customer and Vendor Numbers
- Chart of Accounts
- Items
- Warehouses
- Locations

Don't convert too much

MANAGING CUSTOMIZED TABLES

- How will customized / modified tables be migrated?
- If data exists outside of legacy system, how will it be migrated?
- If data is owned by user(s) [Excel spreadsheets], how will it be standardized for migration?

CHANGING DATA AFTER IT IS MIGRATED

- Reassigning values that are not part of the 'Core' data migration
- Custom processes

DATA CLEANSING . . . *An Iterative Process*

Definition:

The process of preparing the data for migration

What is it?

- Invalid values in the legacy application
- Orphaned records
- Open transactions that aren't really 'open'

How much time?

- Always takes much longer than expected

This is an iterative process.



WHEN SHOULD I START DATA CLEANSING

NOW

It's never too soon.

DATA VALIDATION

- The most important part of the data migration
- Every department needs to participate
- Leverage the power users
 - Knowledge of the business
 - Knowledge of systems
- Get the front line workers – they do the work and understand the data better than most
- When one person does the data validation
 - Assumptions may be incorrect
 - Slows down the process

DATA VALIDATION PROCESS

- Utilize standard ERP_{LN} data integrity tools
- Visual review
- Transaction processing
 - Operational transactions
 - Financial transactions

DATA VALIDATION CYCLE

- Complete cycle of Transaction Processing
 - Migrate MK data
 - Perform technical validation
 - Perform functional validation
 - Perform process validation
 - Identify and document data cleansing requirements
 - Develop data cleansing plan
 - Execute data cleansing activities in MK
 - Re-run data migration process

DATA VALIDATION

DOES NOT

EQUAL

DATA QUALITY

PILOT TESTING FOR DATA VALIDATION

- Test all types of transactions
- Leverage scenarios created for comprehensive pilot testing
- Engage the power users
- Document and identify data issues
- Communicate with the project team

CONCLUSIONS

- Plan
- Communicate & Coordinate
- Manage Expectations
- Allocate Resources
- Allocate Time
- Select The Right Tools
- Pilot Testing
- Validate Data

QUESTIONS

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