

Transitioning to the Cloud: Part 2 – Data Migration

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Today's Speakers



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About Heller Consulting

Select

Needs Analysis and Software Evaluation

Implement

Conversion and Implementation

Optimize

Cleaner Data, Better Business Practices

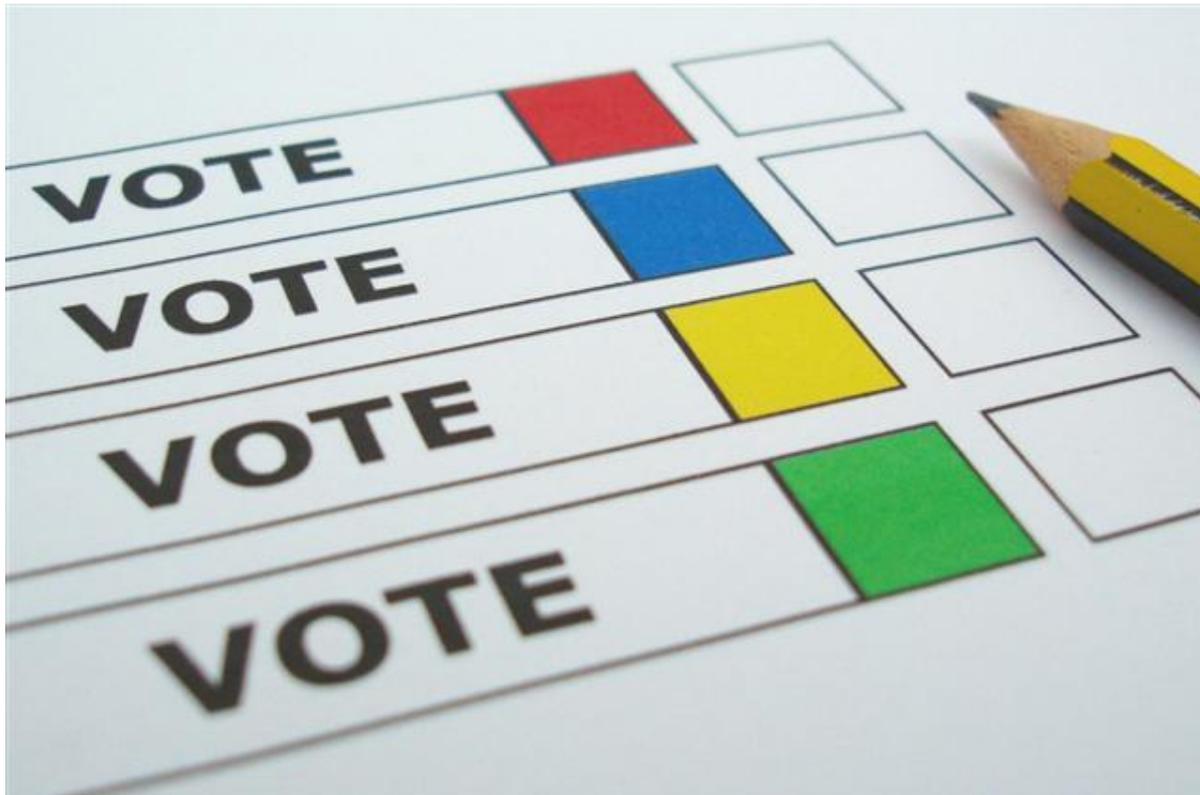
Grow

Leverage Data for Strategic Growth

Our Goal: Empower nonprofits to work efficiently and effectively



Poll



Objectives

- Review key steps
- Provide tips, tricks and best practices
- Share experiences



Case Study: Citizen Schools



Citizen Schools' Migration to the Cloud

2008-2014: Salesforce
Consolidation

2012-2013:
Migration to
Google

2013-2014:
Migration from
Sharepoint

2015: 90%
Cloud



**What we mean when we say
“in the cloud”**

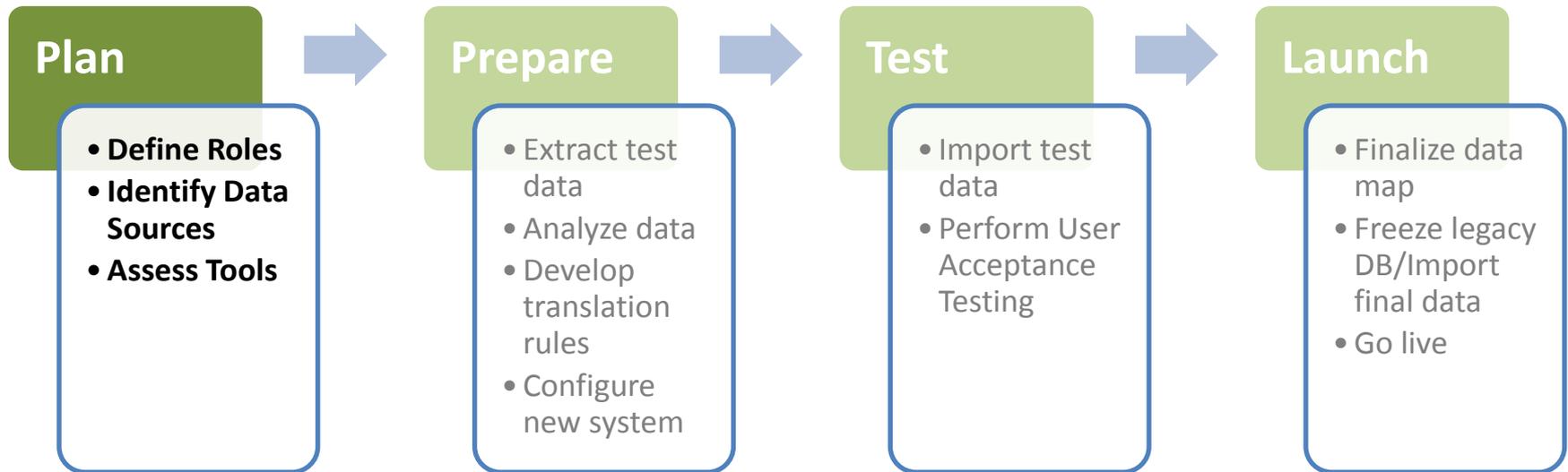


Key Phases of a Data Migration Project

- Plan
- Prepare
- Test
- Launch



The Planning Phase



Define Roles and Ownership

- Identify key project members and roles
- Obtain baseline training



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Recommended Project Roles

Key roles

- Project Sponsor
- Project Liaison
- Subject Matter Experts

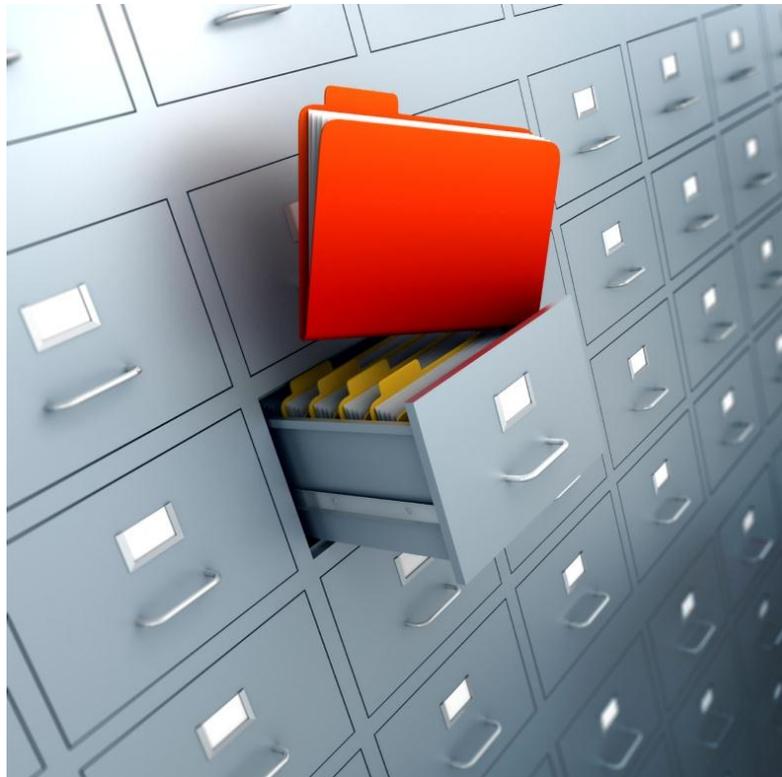
Other roles to consider

- Champions
- Process Owners
- Support Staff
- Other stakeholders



Identify Data Sources (1 of 2)

- Identify sources required for import
- Ask if you really need *everything* in the cloud



Identify Data Sources (2 of 2)

- Prepare for immediate and future needs
- Consider special factors in migrating to the cloud

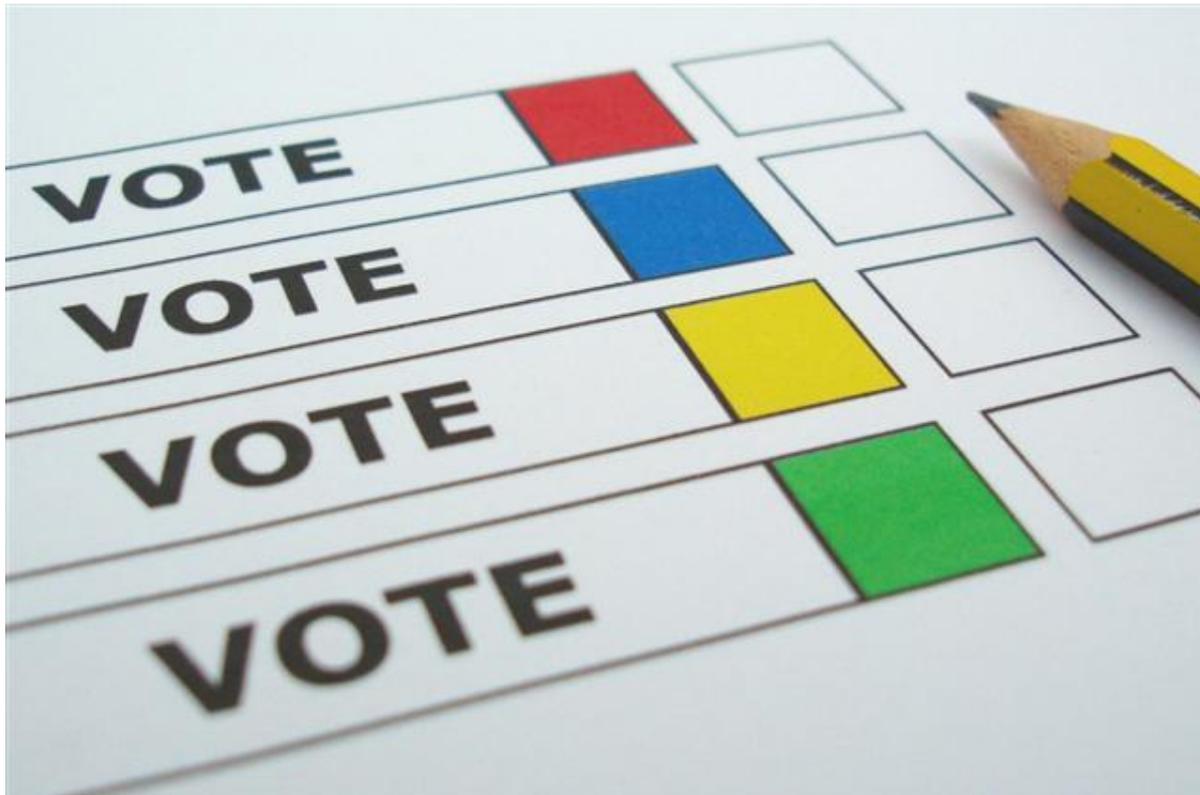


Assess Migration Tools

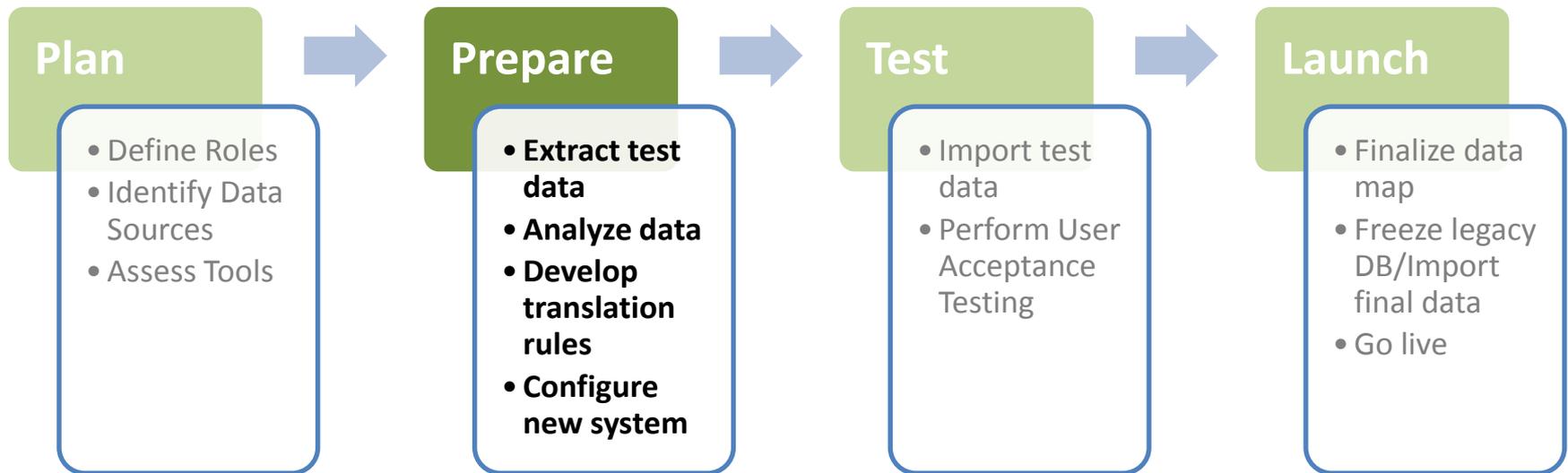
- Identify tools
- Plan for possible downtime



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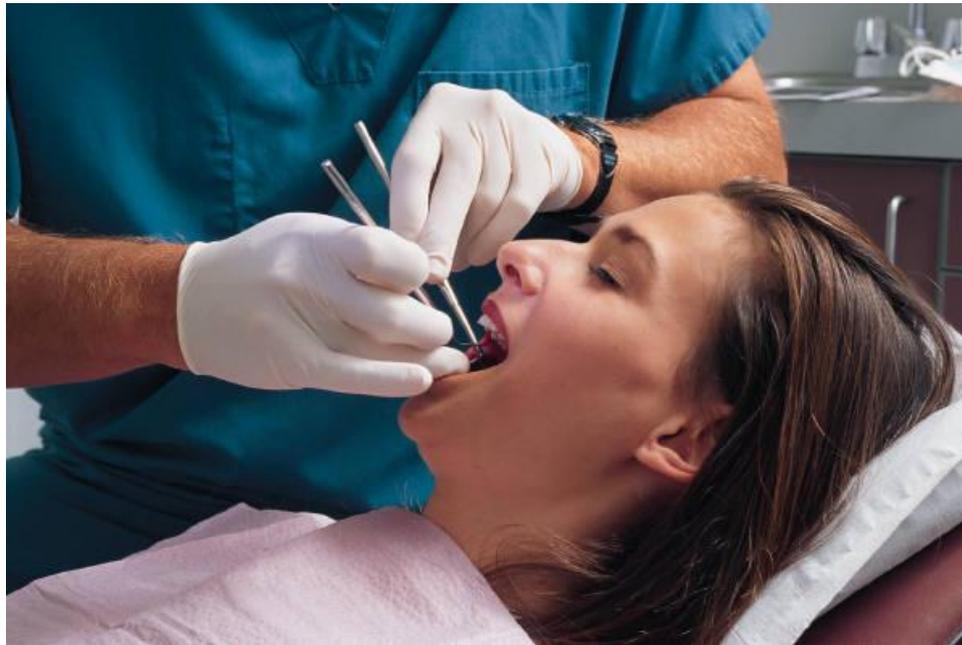


The Preparation Phase



Extract test data

- Test a full data set
- Use unique identifiers
- Ensure format



Analyze data

- Use queries/reports
- Create a data map



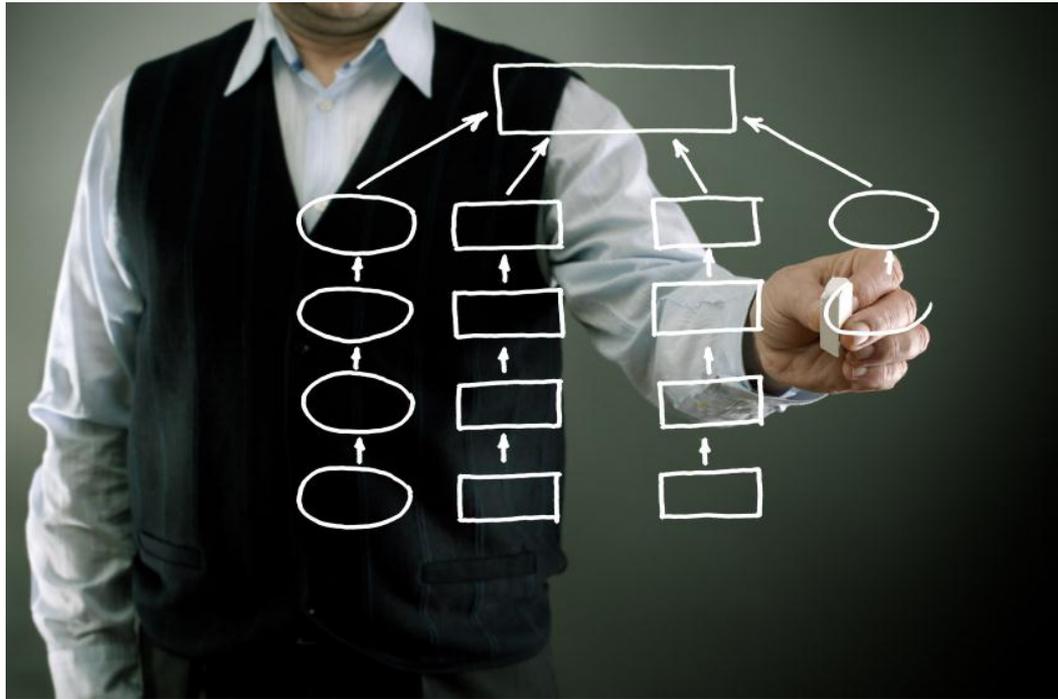
Sample Data Map

	B	L	M	N	O	P	Q	R	
1	Source Field	Convert	SF_Object	SF_Field	SF_Field_Label	Custom	Custom_Data_Type	Translation_Ru	Chart of Valu
2	donor_id	Yes	Account	DPO_ID_Account_c	DPO ID - Account	Yes	Text		For linking to Household rec
3	first_name	Yes	Account	Name					Concatenate first_name and
4	last_name	Yes	Account	Name					Concatenate first_name and
5	middle_name	Yes	N/A						
6	suffix	Yes	N/A						
7	title	Yes	N/A						
8	salutation	Yes	N/A						
9	prof_title	Yes	N/A						
10	opt_line	Yes	Account	DPO_Opt_Addr_Line_Account_c	DPO Optional Address Line - Accour	Yes	Text		Translate to Account field fo
11	address	Yes	Account	BillingStreet					
12	address2	Yes	Account	BillingStreet					
13	city	Yes	Account	BillingCity					
14	state	Yes	Account	BillingState					
15	zip	Yes	Account	BillingPostalCode					
16	country	Yes	Account	BillingCountry					
17	address_type	Yes	N/A						
18	home_phone	Yes	Account	Phone					For Household accounts map
19	business_phone	Yes	Account	Phone					For Org accounts map this fie
20	fax_phone	Yes	Account	Fax					
21	mobile_phone	Yes	N/A						
22	email	Yes	N/A						
23	org_rec	Yes	Account	RecordTypeID					
24	donor_type	Yes	Account	Type					
25	nomail	Yes	N/A						
26	nomail_reason	Yes	N/A						
27	created_by	DNC							
28	created_date	DNC							
29	modified_by	DNC							
30	modified_date	DNC							
31	narrative	Yes	N/A						
32	hh_id	Link (dp.donorID)							
33	hh_salutation	Yes	Account	cv_Salutation_Forma_c	Formal Salutation Text	No	Text		
34	hh_primary	Yes	N/A						

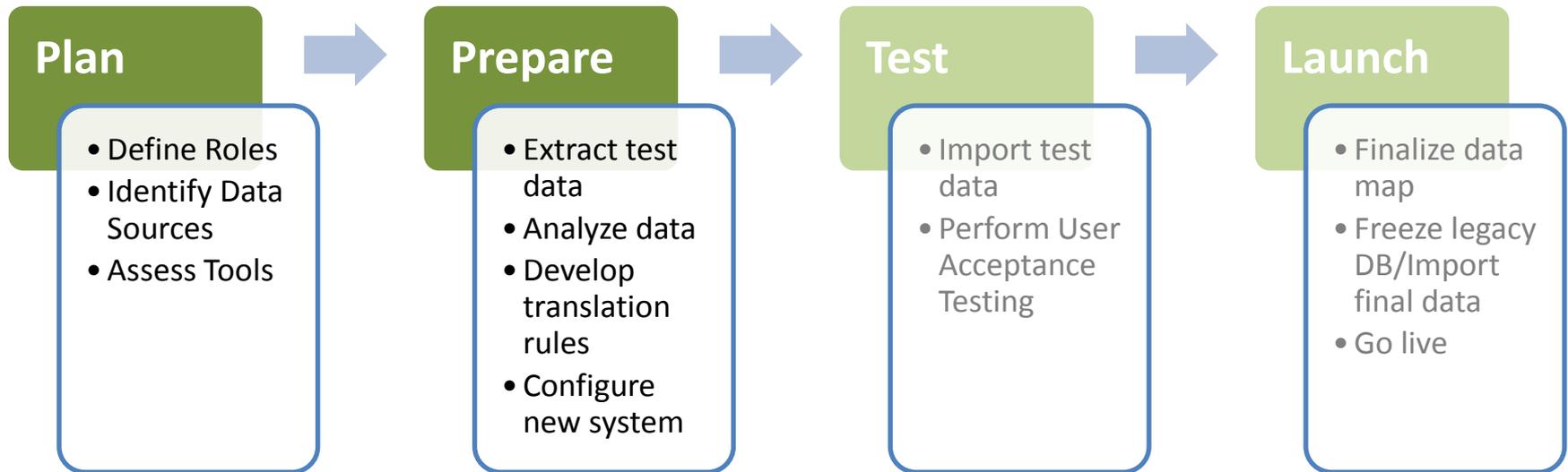


Configure new system

- Setup your new system
- Add test users
- Configure baseline security



Where we are now

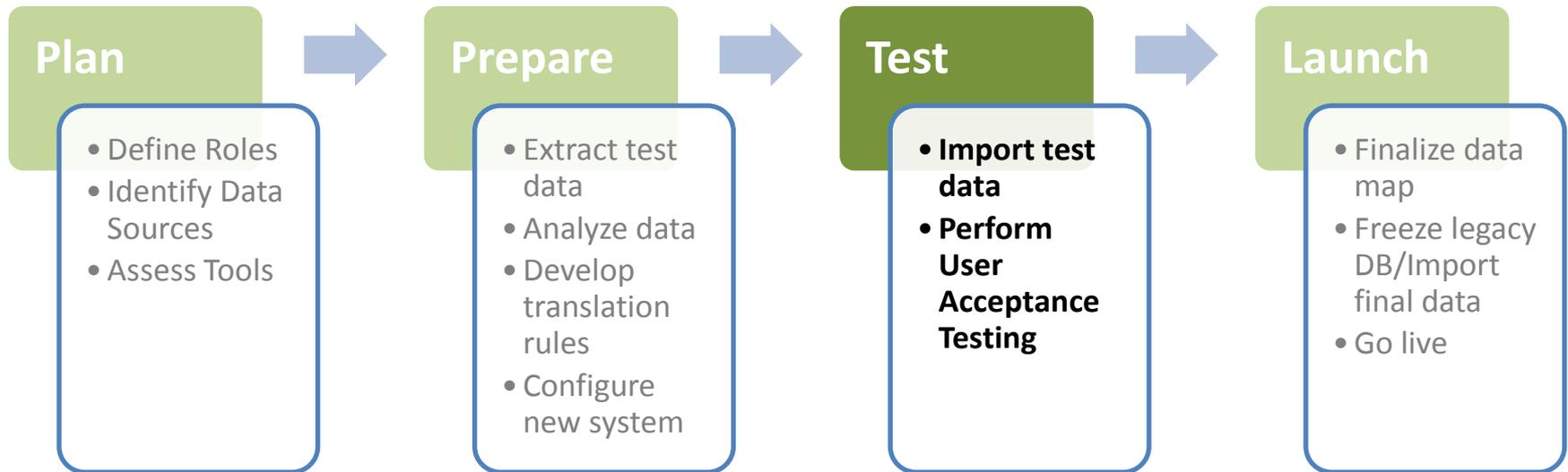




Questions so far?



The Testing Phase



Import test data

- Plan adequate time
- Use a sandbox (if possible)

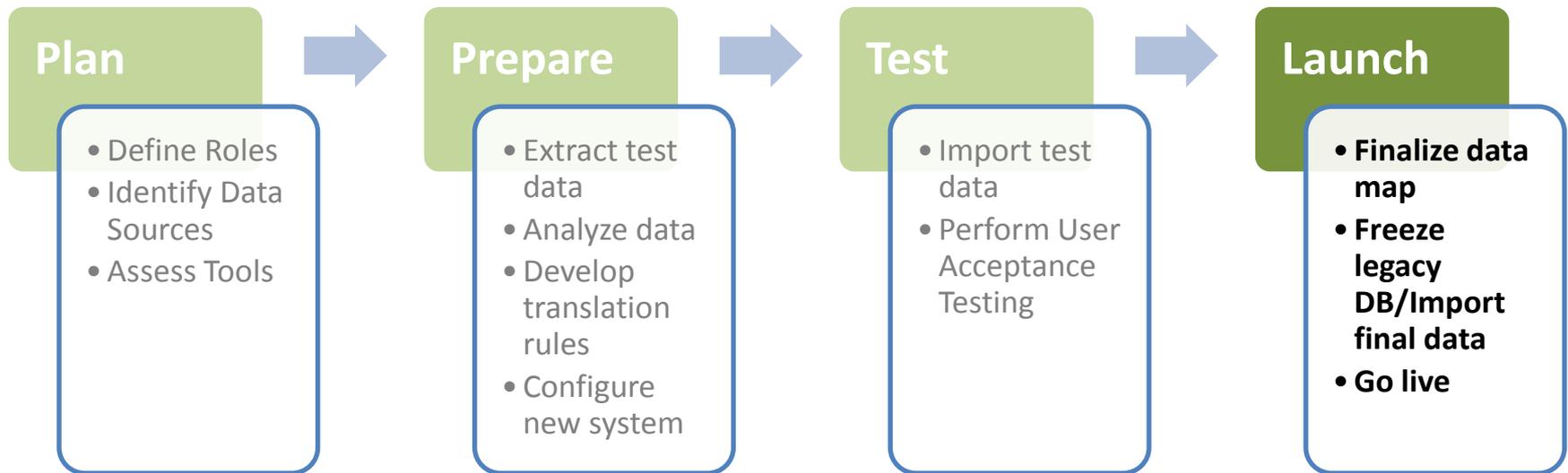


Perform User Acceptance Testing

- Validate test data
- Review business processes



The Launch Phase



Finalize data map

- Revise translation rules
- Determine if correct data was migrated



Freeze DB/Import Final Data

- Freeze legacy database and cloud settings
- Import final data set



Go live (and beyond)

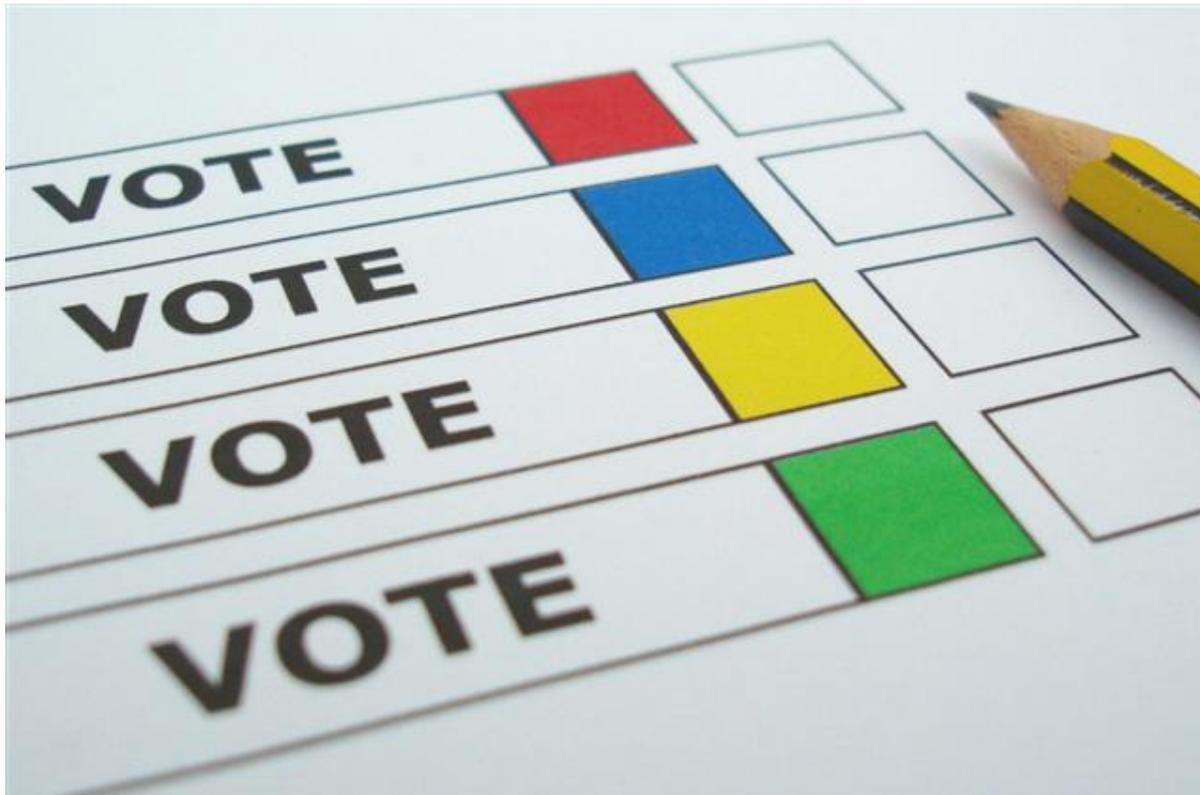
- Validate final data set
- Launch the system
- Capture issues



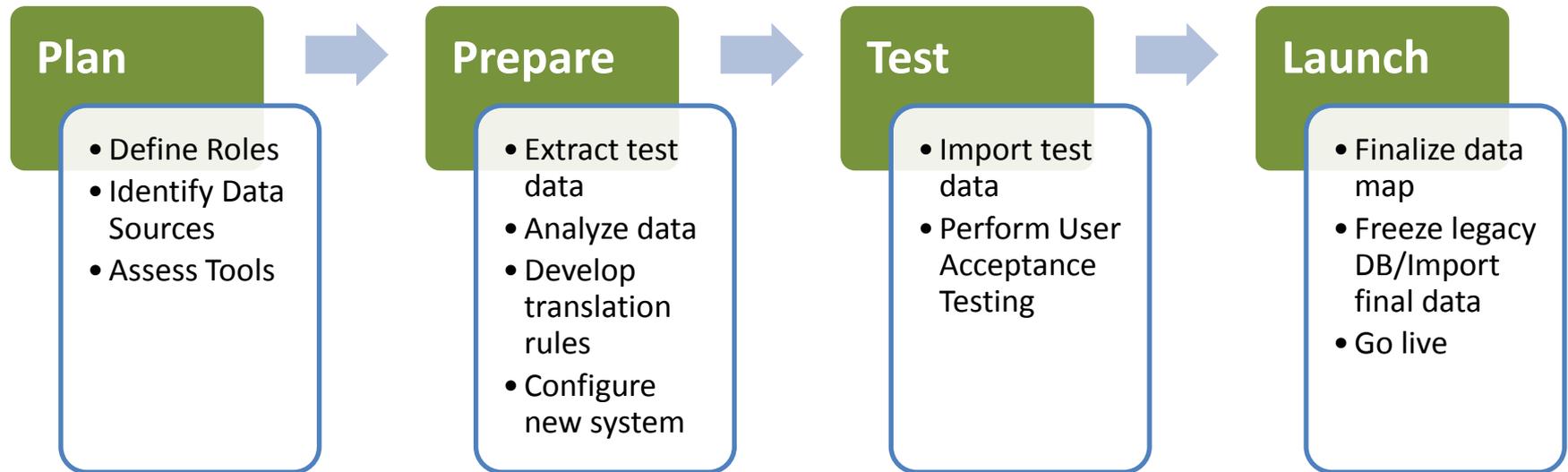
Sample Issue Tracker

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Issue #	Date Reported	Submitted By	Date Updated	Object / Area	Test Category	Issue Description	Example Record ID	URL	HC Comments/Recommendation	Priority	Status	Currently Assigned To	Next Steps
1														
2														
3														
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Recap: Data Migration Action Steps





Questions?



Glossary

- API** Abbreviation of “application programming interface”, which allows two applications to work together to process information
- CRM** A robust database that can store and report on a wide variety of information and support business practices for entering, maintaining and retrieving that data. CRM typically stands for “Constituent Relationship Management”
- Cloud** The use of computing resources (hardware and software) that are delivered as a service over a network (typically the Internet)
- Data map** A document, typically a spreadsheet, which contains information indicating the source and destination of data fields and values to be migrated and any required modifications to that data
- Data source** A data source would be considered anything that contains unique, vital business data that is not housed elsewhere. These can include “rogue” spreadsheets as well as auxiliary systems, such as email marketing databases and even local Outlook files
- Downtime** A planned period of time when a system is unavailable to users

Upcoming Webinar

- Preparing Your Organization (October 11)



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