

Surpass Migration Framework

Executive Summary

This document outlines the Surpass Migration Framework - a structured yet adaptable approach to assessment platform migrations. Built on real-world implementation experience and TOGAF principles, this framework balances the art and science of migration planning to ensure successful outcomes for diverse customer needs.

Migration Lifecycle Overview

The Surpass Migration Framework follows a continuous, iterative approach with dependency reviews at key transition points. This ensures alignment across all Surpass modules and integration points while maintaining flexibility to adapt to customer-specific requirements.

Phase 1: Discovery & Architecture Vision (Pre-Sales)

During pre-sales engagement, Solutions Engineers establish a high-level understanding of customer needs and technical landscape:

Business Context Assessment

- General background of the prospect
- High-level overview of business processes
- Program scale (items, candidates, exams, centers)
- Available development resources

Assessment Delivery Requirements

- Content types and item formats
- Media usage requirements
- Exam classification (stakes, delivery method)
- Dynamic vs. fixed form requirements

Technical Environment Analysis

- Delivery method (Surpass or external vendor)
- Web Delivery vs. SecureClient/SecureBrowser
- Proctoring requirements
- Test center network needs
- Integration requirements
- Hosting requirements (shared instance feasibility)
- Development needs for gap coverage

Outcome: Architecture Vision Document

- High-level migration strategy
- Preliminary timeline and resource requirements

- Initial risk assessment

Phase 2: Detailed Design & Planning

After contract signing, the Solutions Engineer transitions to implementation planning with detailed discovery:

Business Requirements Gathering

- Complete business requirements documentation
- Full inventory of data for migration
- Current state process mapping
- Future state process mapping

Surpass Structure Planning

1. **Center/Subject Structure Design**

- Hierarchical organization mapping
- Site/Center/Subject relationships
- Organizational boundaries

2. **Item Authoring Structure**

- Bank structure design
- Item metadata mapping
- Workflow configuration
- Media handling approach

3. **Test Creation Structure**

- Test settings configuration
- Development workflow establishment
- Blueprint mapping

4. **Test Administration Flow**

- Scheduling approach
- Delivery settings
- Security requirements

5. **Reporting Structure**

- Results processing
- Analytics requirements
- Data export needs

Dependency Reviews

- Cross-module compatibility assessments
- Integration point validation
- Data flow verification

- Process alignment checks

Migration Path Determination

- API utilization assessment
- UI import feature evaluation
- Manual input requirements
- Data transformation approach

Outcome: Migration Runbook

- Detailed migration plan
- Configuration specifications
- Data mapping documentation
- Validation criteria

Phase 3: Build & Configure

The execution phase where planning becomes reality:

Environment Setup

- Instance configuration
- User setup
- Integration establishment

Migration Script Development

- Data extraction from source systems
- Transformation logic implementation
- Load procedures creation

Test Item Creation

- Sample content migration
- Validation of item behavior
- Media handling verification

Outcome: Migration-Ready Environment

- Configured Surpass instance
- Validated migration scripts
- Test data verification

Phase 4: QA & Validation

Comprehensive testing to ensure migration success:

Manual Testing

- User acceptance testing

- Process validation
- Configuration verification

Automated Testing

- Data integrity validation
- Performance assessment
- Integration testing

Dependency Validation

- Cross-module functionality testing
- End-to-end process validation

Outcome: Validation Report

- Test results documentation
- Issue resolution tracking
- Customer sign-off documentation

Phase 5: Go-Live & Handoff

Final deployment and transition to operations:

Production Migration

- Full data migration execution
- Final verification
- Performance monitoring

Knowledge Transfer

- Documentation delivery
- Training completion
- Support transition

Project Closure

- Lessons learned documentation
- Success metrics reporting
- Follow-up planning

Outcome: Operational System

- Fully migrated Surpass implementation
- Trained customer team
- Established support channels

Continuous Improvement

Post-implementation review to enhance future migrations:

- Process improvement identification
- Framework enhancement recommendations
- Best practice documentation

Appendix: Dependency Review Framework

Dependency reviews are critical checkpoints throughout the migration process. Each review should address:

1. **Data Compatibility**

- Is data structured appropriately for all modules?
- Are all required fields populated?
- Are relationships preserved?

2. **Process Alignment**

- Do configured workflows support business requirements?
- Are there process gaps or conflicts?
- Is the user experience optimized?

3. **Integration Viability**

- Are all integration points properly defined?
- Is data transformation adequate?
- Are security requirements satisfied?

4. **Performance Considerations**

- Will the design support expected load?
- Are there potential bottlenecks?
- Is scalability addressed?