Speaker

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Session Objectives

What will you learn today?

1. What data professionals can do *before development efforts begins* to set the stage for success

2. What the project team can do to support data migration success

3. Emphasis on Discovery, Planning and Validation

NOT Session Objectives

What will you NOT learn today?

1. How to use ETL tools
2. How to transform data
3. A one size fits all approach

If this session is not for you find a different User Group FOCUS session that is!

Session Agenda

- Welcome
- Session Objectives
- Agenda Review
- Key Take-aways
- Introductions
- What are we setting the stage for?
- 1. Get Ready
  - Discovery
  - Planning
  - Development
- 2. Rehearse
  - Dry-Runs
  - Validation
- 3. Go-Live

- Objectives Review
- Suggested Resources
- Questions
- Surveys!

Key Take-aways

- ## Key Learnings
  - What the data professional can do during Discovery, Planning and Validation to set the stage for a successful data migration
  - What the project team do to support the success of the data migration

- ## Key Actions for you to take

  - Incorporate what makes sense into your projects
  - Download and use the https://www.xrmtoolbox.com/

Who Am I?

- Working with D365 CE since v1.2
- https://www.linkedin.com/in/carol-bargabus-2094168/

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Who Are You?

Attendee

Who likes improv comedy?

Image from: https://s3.amazonaws.com/media.eremedia.com/wp-content/uploads/2018/06/02140439/improv-700x467.jpg

What are we setting the stage for?

Curtain Up in 5, 4, 3...

Is this the kind of data migration experience you are aiming for?

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Curtain Up in 5, 4, 3…

Or, is this the kind of data migration experience you are aiming for?

Image from:https://www.bing.com/images/search?view=detailV2&id=642F706A20F192D011295B8513058FB69C4349D3&thid=OIP.DYSDDL9KaNTiqlnL5ixAlwHaED&mediaurl=https%3A%2F%2Fwww.theegg.org%2Fwp-content%2Fuploads%2F2017%2F12%2FNutcracker-2017.jpg&exph=1576&expw=2400&q=The+nutcracker&selectedindex=52&ajaxhist=0&vt=0&eim=1,2,6

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Discovery

What awaits you?

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Image: https://acesflyinghigh.files.wordpress.com/2013/09/nasa-discovery-maiden-voyage-1984.jpg

Discovery Worksheet

What is being migrated?

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Source System	Source Entity	Target Entity	DATA TYPE	Max # of Records MIGRATE	Max # of Records INTEGRATE	# of Attributes	# of LOOKUPS	# of OPTION SETS	# of MULTI-SELECTS	CLEANSING Low, Med, High	TRANSFORMA TION Low, Med, High	Is the Source Data ready for migration/inte gration?	Trigg
2	Dynamics CRM 2011 - On-premise	Accounts	Accounts	D365 CRM										
3	Dynamics CRM 2011 - On-premise	Contacts	Contacts	D365 CRM										
4	Dynamics CRM 2011 - On-premise	Opportunities	Opportunities	D365 CRM										
5	Dynamics CRM 2011 - On-premise	Leads	Leads	D365 CRM										
6	Dynamics CRM 2011 - On-premise	Phone Calls	Phone Calls	D365 CRM										
7	Dynamics CRM 2011 - On-premise	Tasks	Tasks	D365 CRM										
8	Microsoft Access	Leads	Leads											
9	Microsoft Access	Accounts	Accounts											
10	Microsoft Access	Contacts	Contacts											
11	Microsoft Access	Opportunities	Opportunities											
12	Microsoft Access	Phone Calls	Phone Calls											
13	Microsoft Access	Tasks	Tasks											
14	csv files													
15														
16														

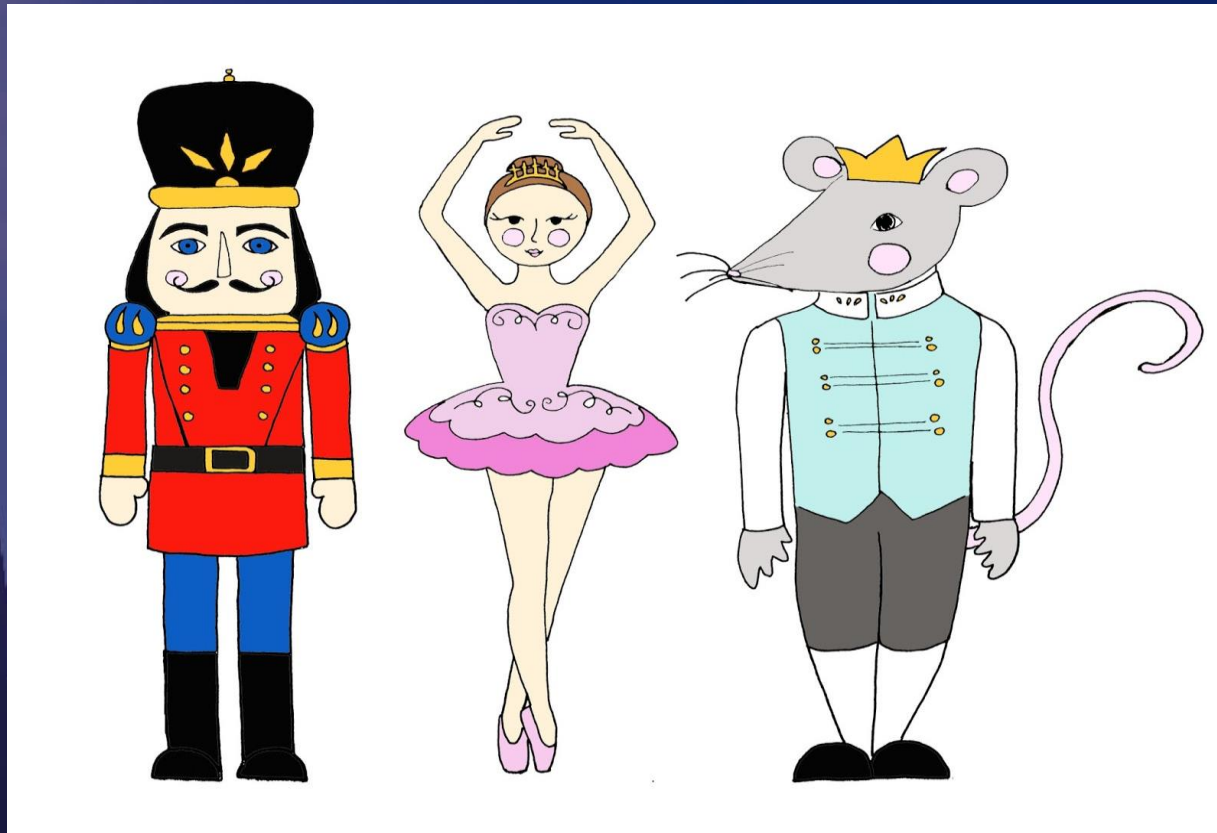# Discovery Worksheet

What is being migrated? continued

Trigger	Frequency	Any related Notes or Documents?	Expect Duplicates	Duplicate Detection Method	ERROR HANDLING	MONITORS Manual or Auto-Alerts	Business Cyclical Impact on Volume?	Highest volume per cycle?	CHANGE TRACKING ENABLED IN CRM?	# of Dry Run per Environment	# of Environments	NOTES

Discovery Worksheet continued

Identify the Stakeholders

Discovery Worksheet continued

Identify the Stakeholders

	A	B	C	D	E	F
	Person	Organization	Role	Backup	Responsibilities	Contact Point for data migration/integration detail related matters
					*Setup Integration Server(s) and required components and software	
					*Purchase & Install integration software	
					*Develop and populate migration source database	
					*Data mapping	

Planning

- **Approaches**
- **Tools**
- **Data Maps**
- **Migration Patterns**
- **Go Live Patterns**

Image From: https://pas-wordpress-media.s3.amazonaws.com/wp-content/uploads/2012/08/web-development-plan-1.jpg

Discovery
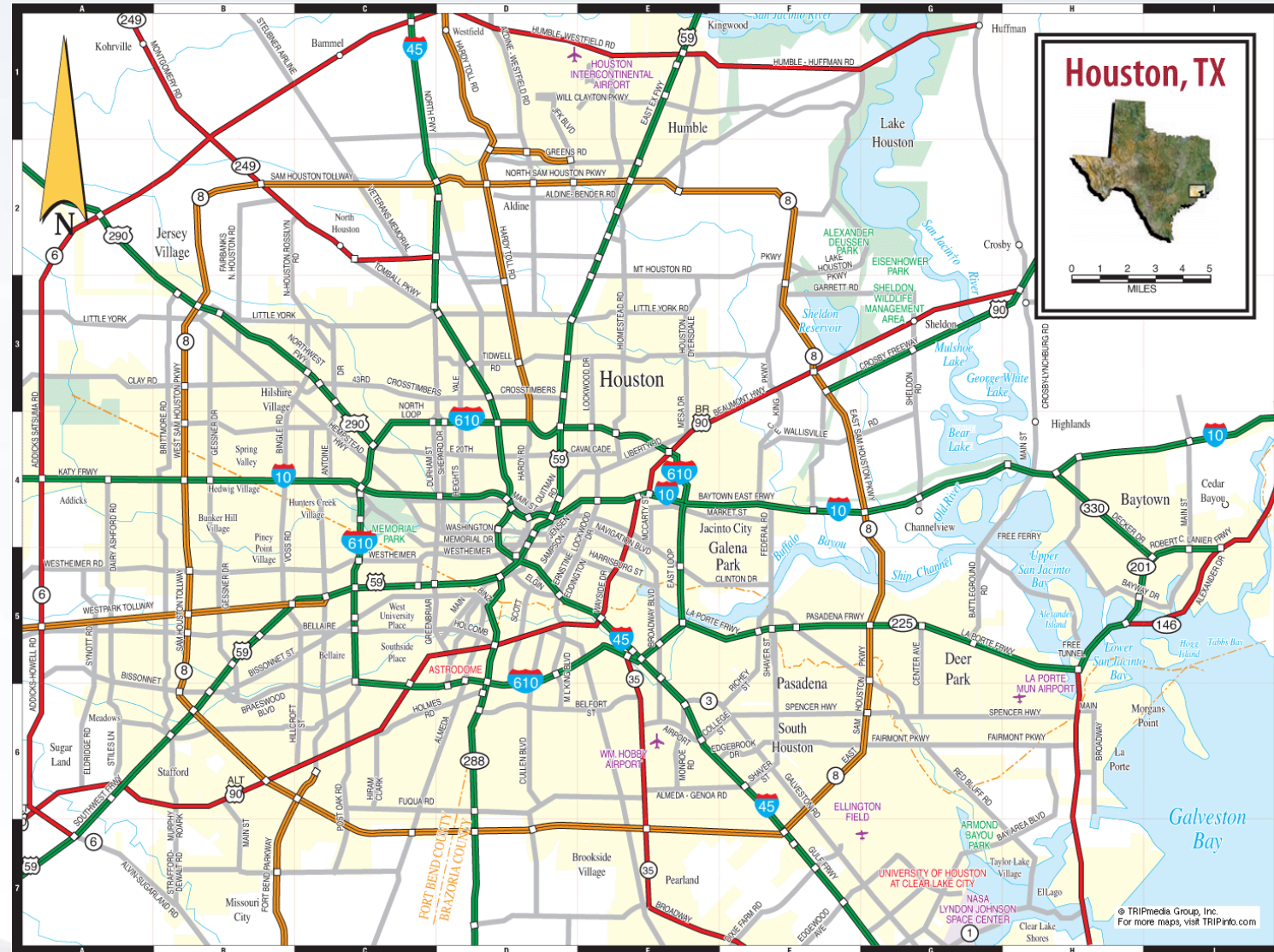
PLAN

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Approach

- Full Lift and Shift
- Partial Lift and Shift
- Relevant Data

Tools

- Import Wizard
- Configuration Migration Tool from Microsoft
- TIBCO/Scribe: Online or Insight
- SSIS
- SSIS + Adapters
- KingswaySoft
- Microsoft Lifecycle Service On-Prem to Online migration tool

Data Maps

Image from:
http://1.bp.blogspot.com/-h-1tdJoL7gQ/Uh5KHxcJBII/AAAAAAAAMLo/lvPaWkU_Xxw/s1600/TX-Houston.gif
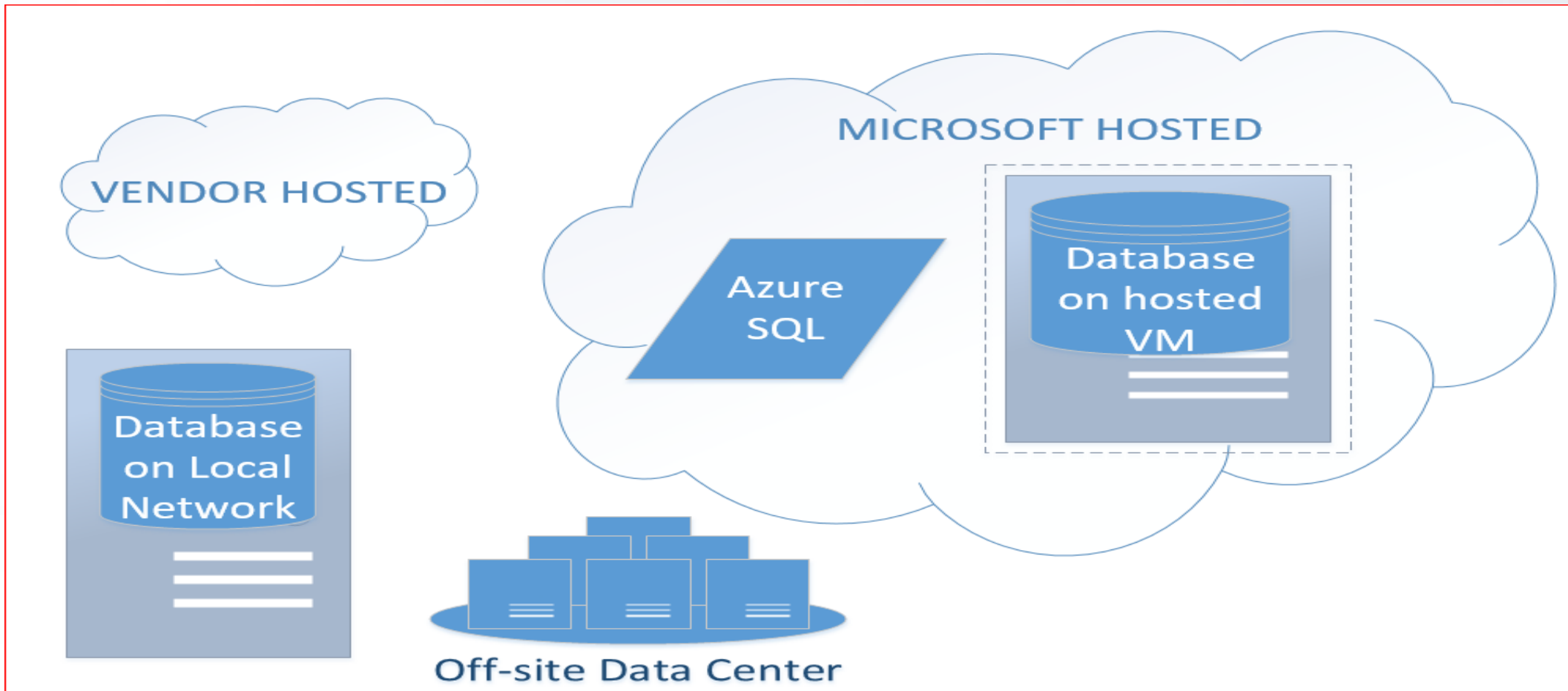
Data Maps

- Option Sets

Display Name:	Discount ID					Name		Date
Global/Local:	Local				Business Office Approval		John Doe	
Used by Entity:	Product							
Source Table			**Transformation**	**Target - CRM OptionSet** **abc_productdiscountidcode**			**Notes**	
ID Value:	**Description**			**ID**	**Description**			
			Maps To	0	None			
				1	Non-Protective Treatment			
				2	Protective Treatment			
				3	Special Promotion 1			
				4	Special Promotion 2			
				5	Other 1			
				6	Other 2			

Data Maps continued

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
TRIGGER DESCRIPTION:														
SOURCE QUERY:														
SOURCE:			CRM						TARGET:	GP Customer				
ACME Target Reviewed and Approved By Name & Date:														
PowerObjects Acknowledgement of Target Approval														
	Entity Schema Name	Column Schema Name	Column Display Name	Type	Description	Custom Attribute?	Requirement Level	Additional Data	Transformation	GP Column	Notes about the GP Column	Table Column	Data Type	Length
	Account	*AccountId*	*Account*	*Uniqueide*	*Unique identifier of the account.*	*SystemRequired*				CUSTNM BR	uniqueidentifier			
	Account	GP Customer Number	Parent	Lookup		False	SystemRequired	Targets: account contact	Account.GPCustNumber	CUSTNM BR	Needs to map to account with matching pro_greatplainscustomerno	ParentKey	uniqueid entifier	
	Account	PrimaryContactId	Primary C	Lookup	Choose the primary contact for the account to provide quick access to contact details.		None	Targets:contact	PrimaryContactIdname	CNTPRSN	String value if we have it	Contact		
	account	pro_gpcustomerclasscode	GP Custom	Picklist			ApplicationRequired	Options: 1: ACME-Solid 2: ACME-Striped 3: ACME-Plaid 4: ACME-Polka Dots 5: ACME-Diamonds 6: None 7: Seven 8: Eight 9: Nine 10: Ten Default: 6	code name		Class ID			

Data Migration Patterns

Data Migration Patterns
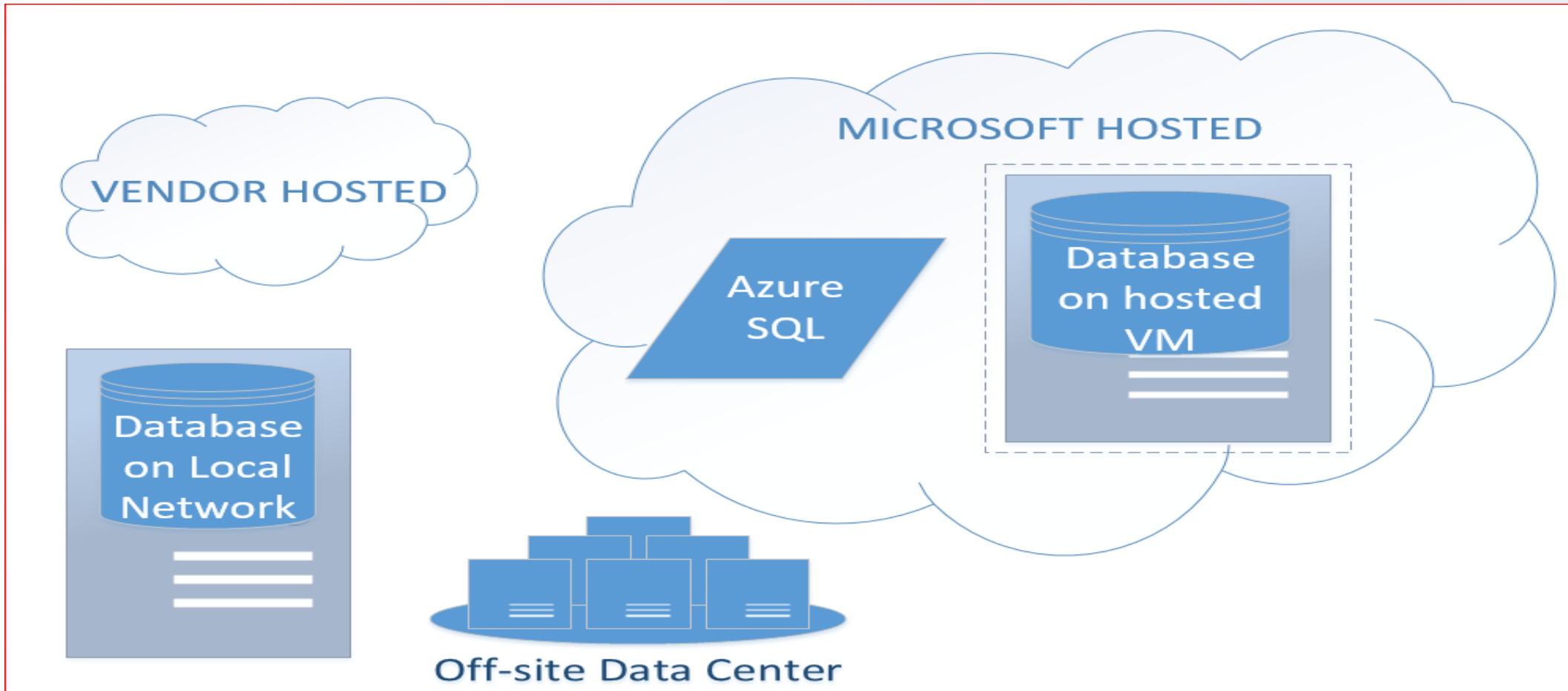
Go-Live Patterns

- Initial Load @ go-live
- Initial Load + Delta @ go-live
- Initial Load + Delta + Delta @ go-live
- Initial Load + Delta @ cutover + post-go-live load of historical/complementary data

Scripts

Component Grouping Example

Object Type	Entity Config Group	Display	Custom or OOB	Config Data (Y/N)	Migration	Integration	Used By
Entity	B	Business Units	OOB	Yes	No	No	
Option Set	Z	Country	Custom	Yes	No	No	Addresses
Option Set	C	Custom Option Set	Custom	Yes	Yes	Yes	Product
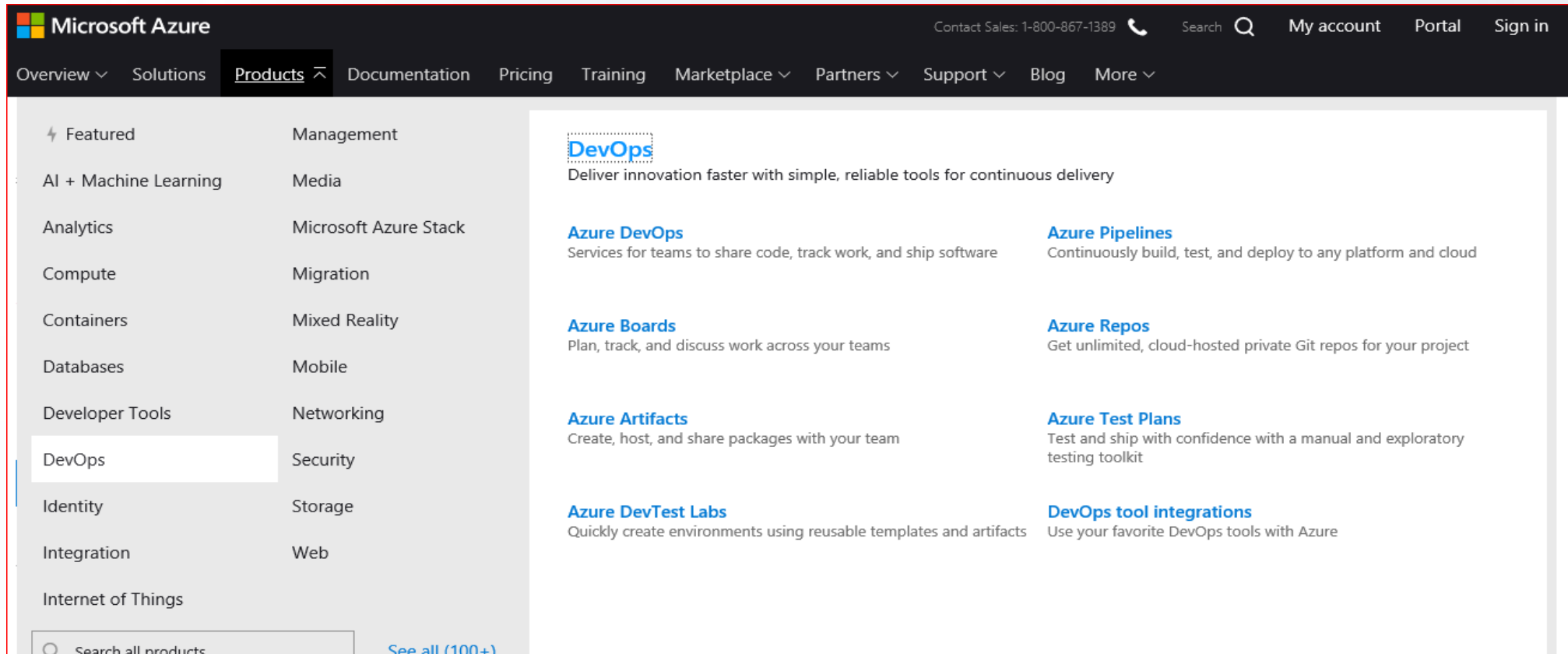
Development
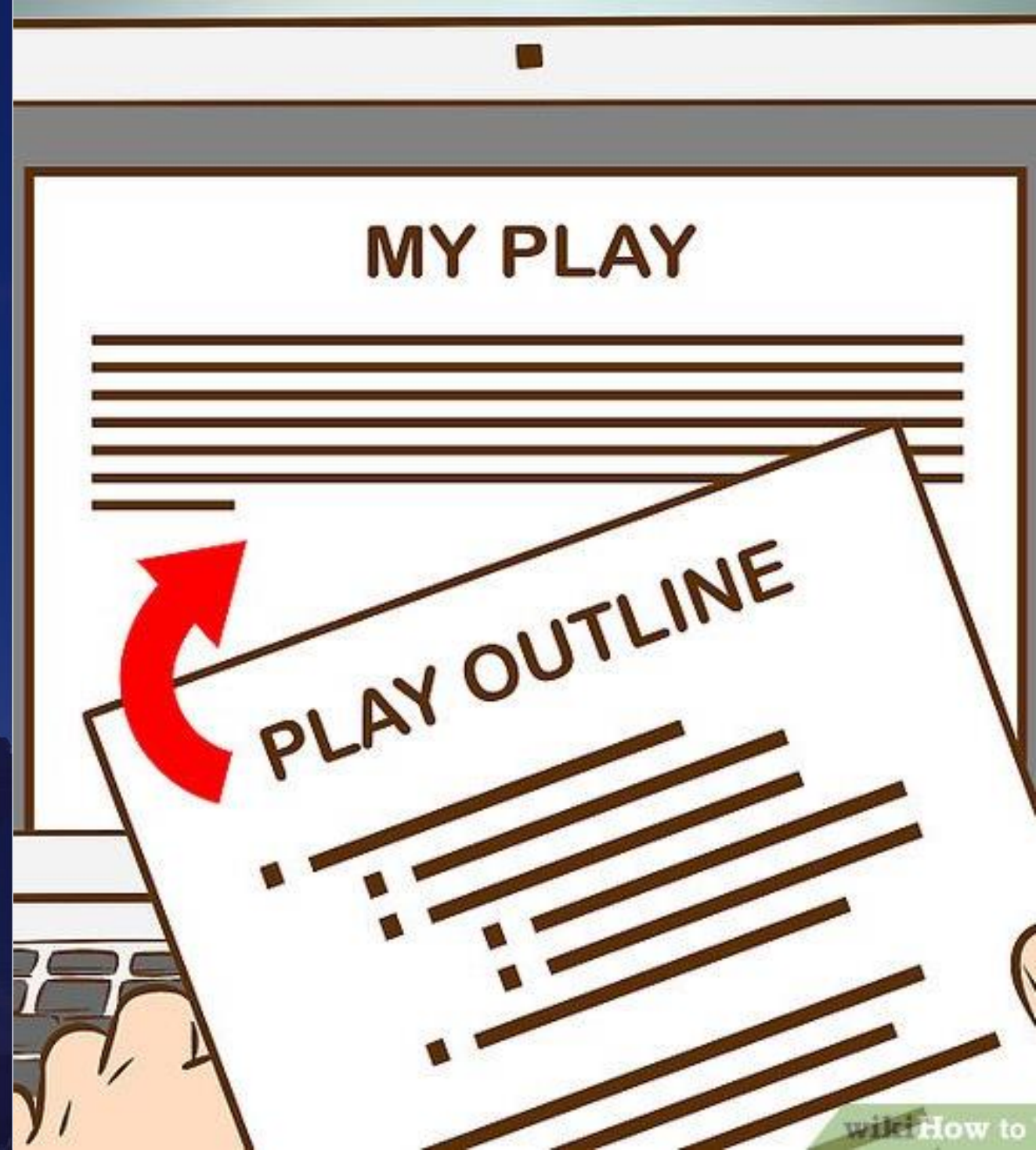
Script Organization

- Folders
- Sequencing
- Batching
- Source control
- Build for insert and updates

Source Control

https://azure.microsoft.com/en-us/solutions/devops/?v=18.44

Solutions

2. Rehearse

Deployment Plan

- Check-list

Release #	Destination Instance	Sequence	Category	Entities	Task	SourceControl Reference Location	Source Control Reference	Source Rows #	Source
			Data - Delta Load	Account	12 - Import Accounts	Location in SC	script to run		
			Data - Delta Load	Account	16 - Set Parent Accounts				
			Data - Delta Load	Call	33 - Import Calls				

Validation

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Validation

- What do you validate?
- Identified data owner in the business office
  - Request they validate and email feedback or approval
- Automated Validation?
- https://www.powerobjects.com/blog/2018/03/02/dynamics-365-data-migration-testing-best-practices/
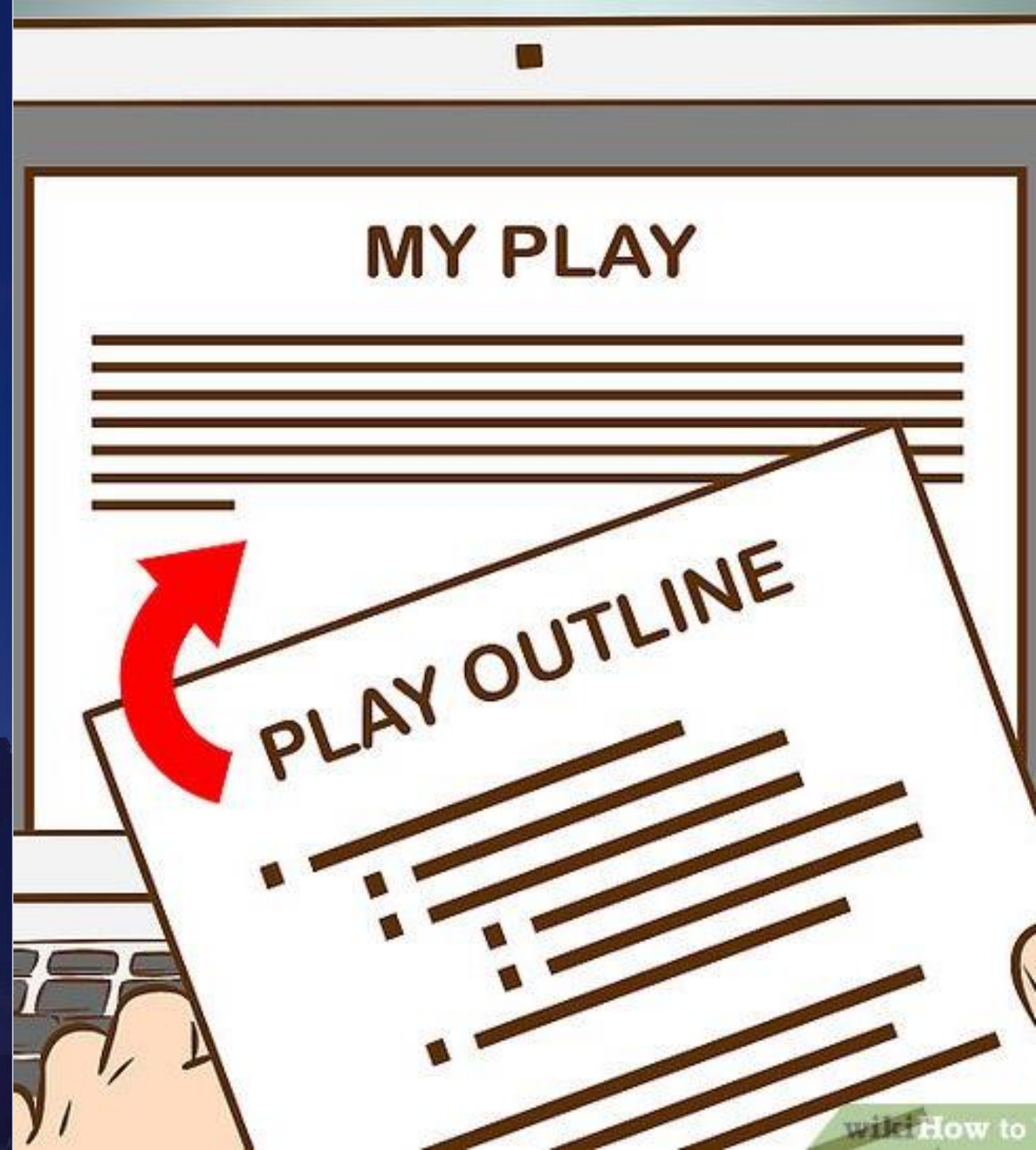
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Validation

- Start Date and Time
- End Date and Time
- Source Row Count
- Successful Insert & Update
- Rejected/Error Counts & Details
- Research and Resolve Errors
- Duration – As expected?
- Destination Row Counts

Adjust

Image from: https://www.wikihow.com/Write-a-Play-Script
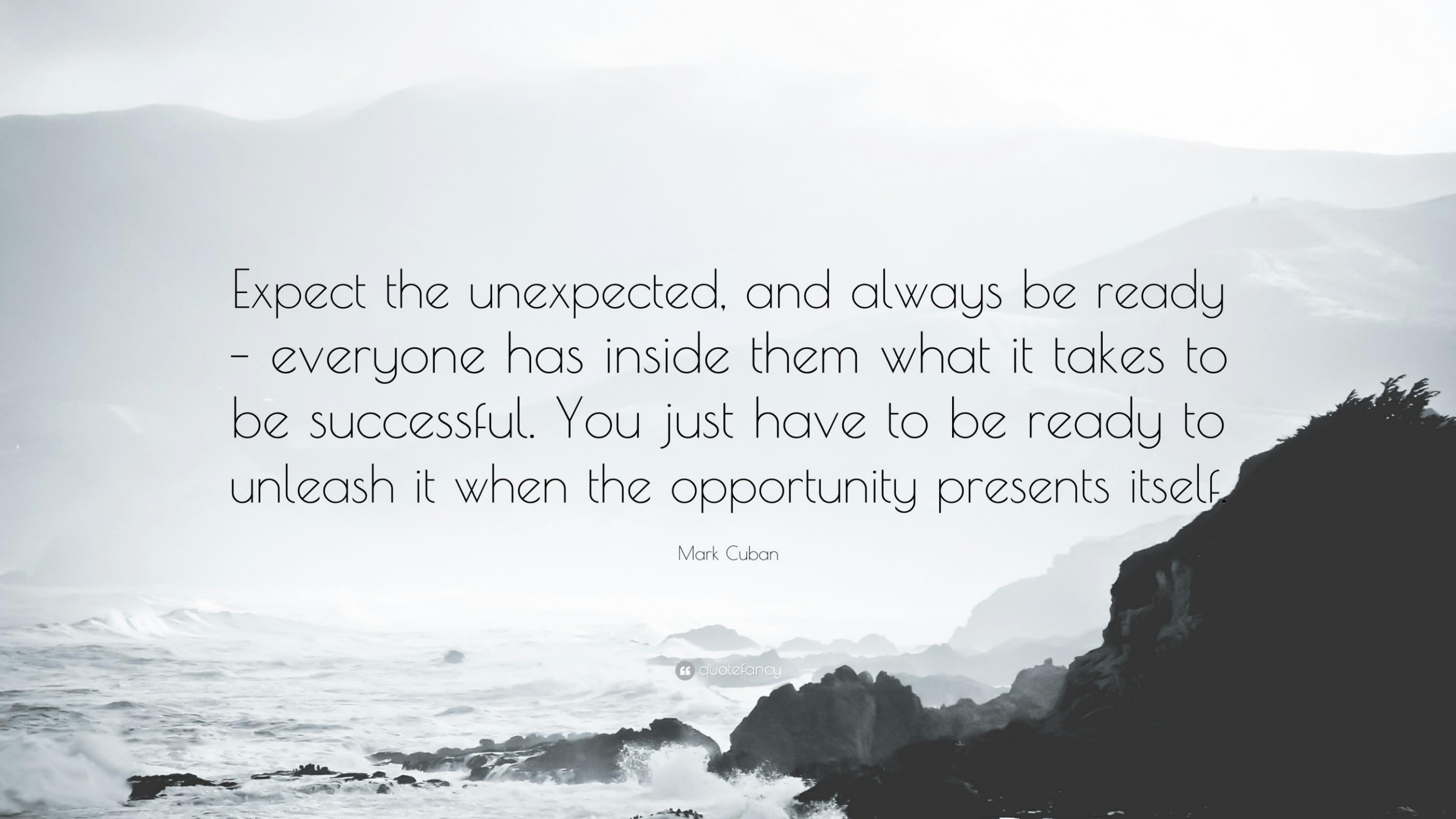
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MY PLAY

PLAY OUTLINE

wikiHow to

Adjust

- Evaluate what went well

- Triage and prioritize errors and issues

- Work with the team to resolve, alter the plan

- Consider another dry-run

- Include input from the Data owner

3. Go-Live

Expect the unexpected, and always be ready – everyone has inside them what it takes to be successful. You just have to be ready to unleash it when the opportunity presents itself.

Mark Cuban

Objectives Review

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Session Objectives Review

What did you learn today?

1. What data professionals can do *before development efforts begins* to set the stage for success

2. What the project team can do to support data migration success

3. Emphasis on Discovery, Planning and Validation

What can the data migration lead do to set the stage for success?

- COMMUNICATE with the project team
- DISCOVERY Spend time on discovery efforts
  - Request, or better yet, INSIST, that data efforts begin as soon as the project starts.
- PLANNING Don't skimp on planning efforts
  - Consider and decide on migration architecture pattern early
  - Consider and decide on go-live pattern early
  - Purchases? Start shopping!
- DEVELOPMENT: Know your tools. Use Source Control.
- VALIDATE Early and often in non-prod instances. Document clients approval of data imported
- MITIGATION PLANS Have them. Practice them. Use them.

What can the project team do to set the stage for data migration?

- Begin data efforts at the start of the project
  - Include data discovery, cleansing
- Identify data decision makers and block time for their efforts
- Align system design and configuration efforts with data efforts throughout the project
- Manage expectations around the data migration
- Awareness of automation – domino effect
- Understand the impact data migration can have on user adoption
  - Broken Trust
  - Integrity of the system
  - Difficult to learn and use
- Understand at some level what is required for a successful data migration
  - Sitting in this session is a great step in that direction
  - Lunch with your data specialist

Suggested Resources

- Download and use the https://www.xrmtoolbox.com/
- Configuration Data Migration Tool From MS
- https://www.kingswaysoft.com/blog
- https://help.scribesoft.com/scribe/en/index.htm
- https://www.powerobjects.com/blog/2018/03/02/dynamics-365-data-migration-testing-best-practices/
- Checkout the PowerObjects Learning Tools at
  - https://www.powerobjects.com/blog/
  - https://www.powerobjects.com/videos/
  - https://www.powerobjects.com/microsoft-dynamics-education/webinars-on-demand/

Questions

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Thank you

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Please complete your surveys now
www.ugfocus.com/houston-survey

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