**Data Migration**

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# BASIC OVERVIEW:

## Actions/steps involved during the data migration process:

### Customers, Myitems, Users :

1. Initially, the data migration flag is marked as **‘N’** for all the Customers(Master Customer, Customer, Customer Location), Myitems and Users (internal /external) data.
2. The Customers, Myitems and the External users data will be pulled based on the **Customers\_Id** available in the **CustomerXref\_NextGen** table.
3. Once migrated these Customers, MyItems and External users migration flag is set to **‘M’** along with the deleted flag set to **‘1’**.
4. The rejected records will be marked as **‘R’** and the deleted flag will be reverted back to **‘0’**,if any**.**

### Internal Users :

1. All the internal users will be pulled in a single shot and will be marked as migrated **‘M’**, however the deleted flag is unchanged.
2. The next time when the internal users are pulled only the newly added users or the recently modified users will be pulled based on the **DateLastModified and dMigratedTimestamp.**

### Rollback :

1. After the data is being pulled, the ETL job will archive the Customers in the CustomerXref\_NextGen table to the archive table with the current date.
2. For roll backing the changes, we will be roll backing based on the archive date provided in the archive table. All the customers belonging in that date will be rolled back. The migration flag will be set as **‘B’** and also the deleted flag will be roll-backed to **‘0’**.

### Migration Status Code:

|  |  |
| --- | --- |
| **Migration status code** | **Description** |
| N | Non-migrated |
| M | Migrated |
| R | Rejected |
| B | Roll backed. |

# 

# DETAILED OVERVIEW:

### Data Migration:

1. The customers provided by BIM for migration (mostly by a spreadsheet) will be inserted into the table **customerxref\_nextgen** using the stored procedure **up\_insert\_customerXref**.
2. The customers, associated my-items, associated external users will be pulled using the ETL jobs.
3. All the jobs are available in the **Reporting Requets > Data Migration Flags** folder.
4. The jobs should be run by entering an appropriate parameter.

i.e. Enter **‘C’** to extract based on the customer list provided by BIM or enter **‘F’** to fully extract the records.

1. The jobs should be run in the below mentioned order to avoid the missing of pulling any customers records.

* MasterCustomerProfile\_Flags
* ItemProfileExtract
* ItemProfile\_Flags
* CustomerLocationsProfile
* CustomerSpecificProfile (Not based on the Customer List but depended on the Customer profile extraction)
* CustomerProfile
* UserProfile\_Extract\_flag (for external users)
* ExternalUserProfile

1. All the internal users will be pulled irrespective of the customer list using the job InternalUserProfile\_flag
2. After the completion of the data migration, the job **CustomerArchive** should be run to archive the Customers in the **CustomerXref\_NextGen** table to the archive table **customerxref\_nextgen\_archive** with the current date.

### Roll-Backing:

1. For roll-backing the migration changes regarding the customers and its associated data like my-items and external users, we will be using the timestamp provided with the **customerxref\_nextgen\_archive** table. All the customers under that timestamp will be roll-backed.
2. The SP **up\_rollback\_nextgen** will be used for roll-backing with parameter as timestamp.
3. After execution, the migration status will be changed to **‘B’** and also the deleted flag status will also be reverted back to **‘0’**.