

New approach for Data Migration to Dynamics 365

A paper for data migration professionals, by Elena Yakovenko.

Abstract: This document is created for project managers who need to deliver data migration on time and budget for Microsoft Dynamics 365 (D365) implementation.

Overview

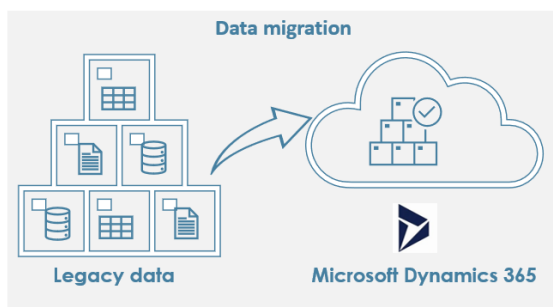
Complexity of data migration is often underestimated. Even straight forward implementation of standard functionality in D365 may involve unexpected risks related to data migration. Many projects have delays and fail to launch the new system on time due to incomplete data migration.

This document highlights main challenges of data migration and how to overcome them with our new approach.

What is the usual approach?

Depending on complexity of the implementation project there are following approaches:

- For “simple” implementations data migration is done manually by business users. They receive standard templates for data upload. Preparation and validation of data is done manually. Technical support is limited.
- For “moderate complexity” implementations technical consultants help business users to migrate data. Some level of automation is provided for extracting and converting source data. Validation of data is performed in D365.
- For “complex” implementations a partially automated process does not work. Functional consultants translate business requirements into specifications. Developers create a custom solution to automate data migration. Most work is performed by data migration team. Business users verify results during acceptance testing.



Why old methods do not work?

There are 5 main reasons why data migration to D365 may fail:

- *Unrealistic data scope and lack of priorities.*

Initially business users want all their legacy data to be migrated. The scope is big and has no clear priorities. Trying to deliver the full scope of historical information at once leads to many errors and rework. The migration becomes too complex and unrealistic to deliver on time.

- *Unclear responsibilities and lack of qualified resources.*

Responsibility gap and lack of qualified resources is a big issue on data migration projects. System integrators expect the business to provide valid and correct data. Business users struggle to understand D365 requirements. It is difficult to find data migration consultants who understand the business problems and the system specifics. If roles and responsibilities are not clarified, then data migration gets stuck in conflicts.

- *Lack of appropriate tools*

Using manual methods to prepare data is time consuming and unpredictable. The complexity of D365 and source systems adds extra challenges to make mapping and conversion of data difficult to manage manually. Development of custom solutions is expensive and risky. Data migration requirements can change during the project as the D365 configuration develops. Cost of development and redevelopment may be too high.

- *Quality issues*

If validation and testing are not performed regularly then business users discover incorrect information too late. Fixing data issues in D365 becomes very expensive closer to go-live.

- *Inefficient communication*

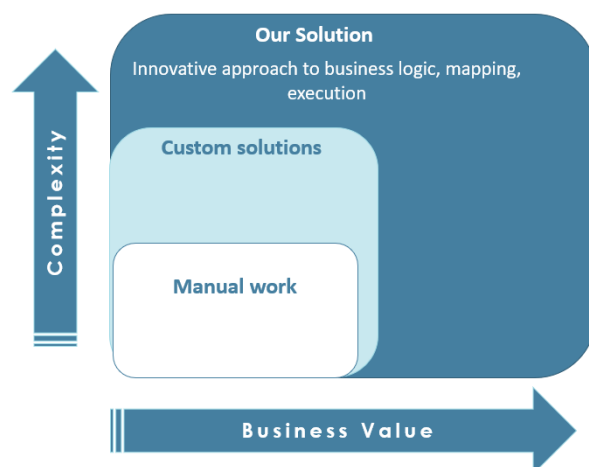
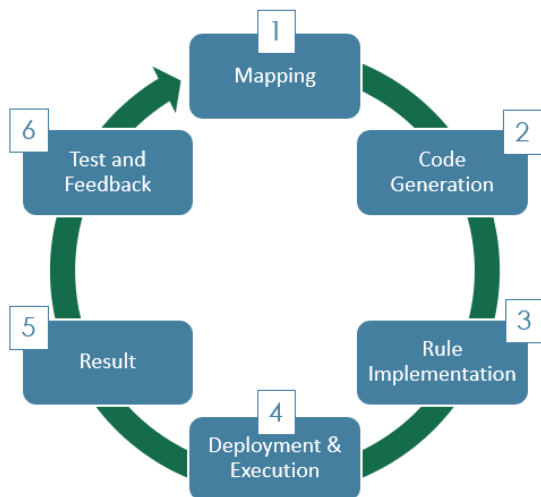
Communication between the business team, consultants and integrators often is not efficient. Time is wasted on meetings, emails and documentation. Delaying critical decisions and actions slow down progress of data migration.



New approach - migFx for Dynamics 365 Finance

We consider that what every data migration is needs an agile framework and special tools. We know that business users can make decisions about their data. But technical support and automation are required. What we present to you is the new way of dealing with complexity of business data migration to D365.

migFx for Dynamics 365 Finance is a set of software tools created by experts with extensive experience on different data migration projects. A new framework eliminates the major risks of data migration failure. Our solution has significant advantages compared to a manual approach and the development of custom solutions. It is scalable for different levels of complexity and provides maximum value for business.



Agile process

migFx is an integrated system which supports an Agile methodology. Complex data migrations are done in small iterations. The migration starts with the minimum required items of data. Each subsequent iteration adds more information and business logic. The automated process makes it easy improve the quantity and quality of data until goals are met.

1. Mapping is modified continuously
2. New code is generated based on the latest mapping
3. Manual rules may be added/modified
4. The code is deployed and executed
5. The results are published
6. Test and feedback flows back - and the cycle repeats



Business objects are key elements

Instead of dealing with many separate data entities which are difficult to relate and understand we take a business-oriented approach. Data specification is logically grouped into business objects. Business users can specify data requirements and take responsibility for scope and quality. They can control which information is critical for a successful migration. With business objects as the key elements of migration it is easy to define the scope of work and set priorities.

All migFx functionality is built around these business objects.

- *Studio* - is used for specifying data requirements and mapping
- *Engine* - automatically generates code from the specification
- *Director* - a place where data extraction and conversion is executed
- *Tracker* - a portal where all results are shared with team

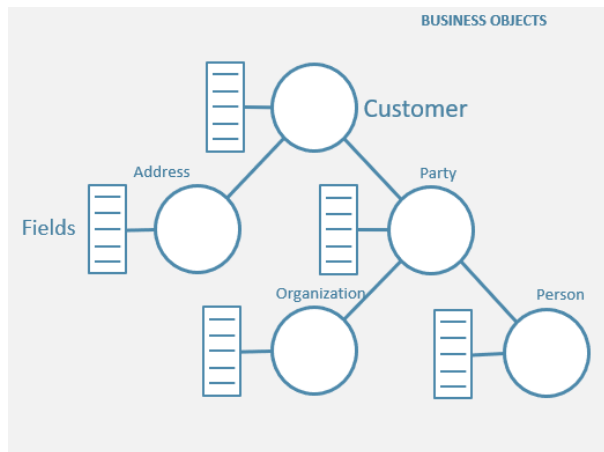
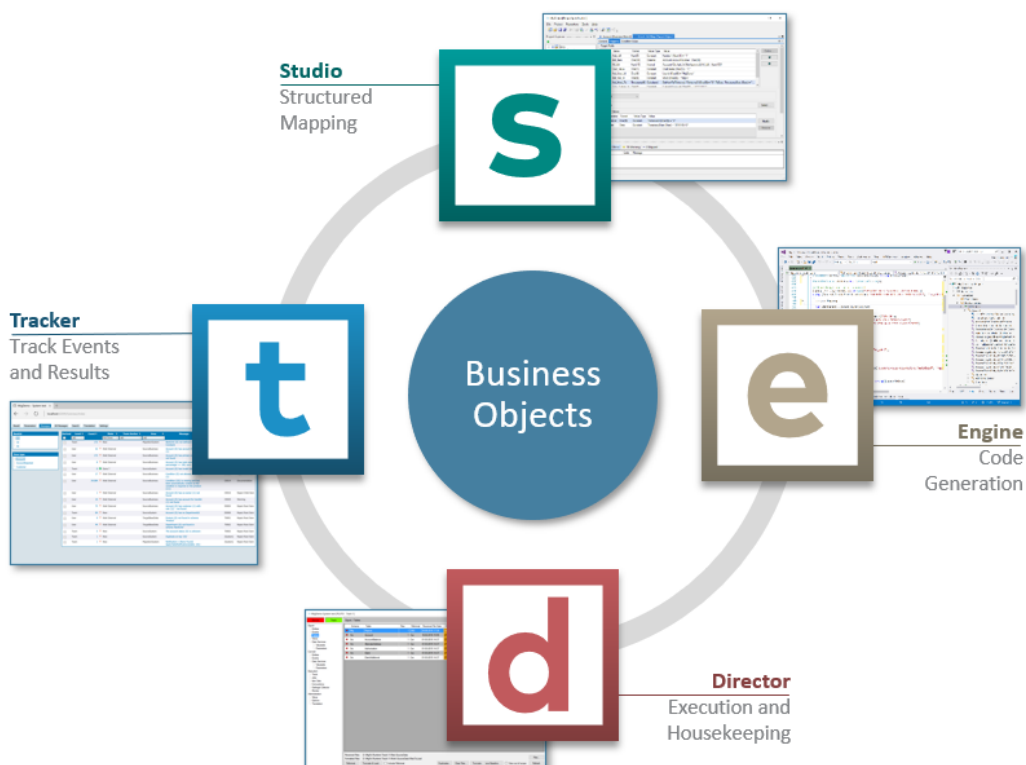


Fig.2 Business objects





D365 data entities are implemented

D365 is one of the target systems for migFx. The pre-built target map covers standard D365 data entities and technical requirements: data structure, formats, references, calculated values, validation rules. Custom data entities can be added and implemented without coding. As a result, standard and custom data can be prepared for D365 without development.

Source data mapping is simplified

Data in legacy systems may look different from the requirements of D365. But the essence of business logic is the same. We provide tools for data mapping using business objects. migFx can import data extracted from a variety of sources. The source data is taken in its original format and the software is used to perform any automated transformation and conversion.

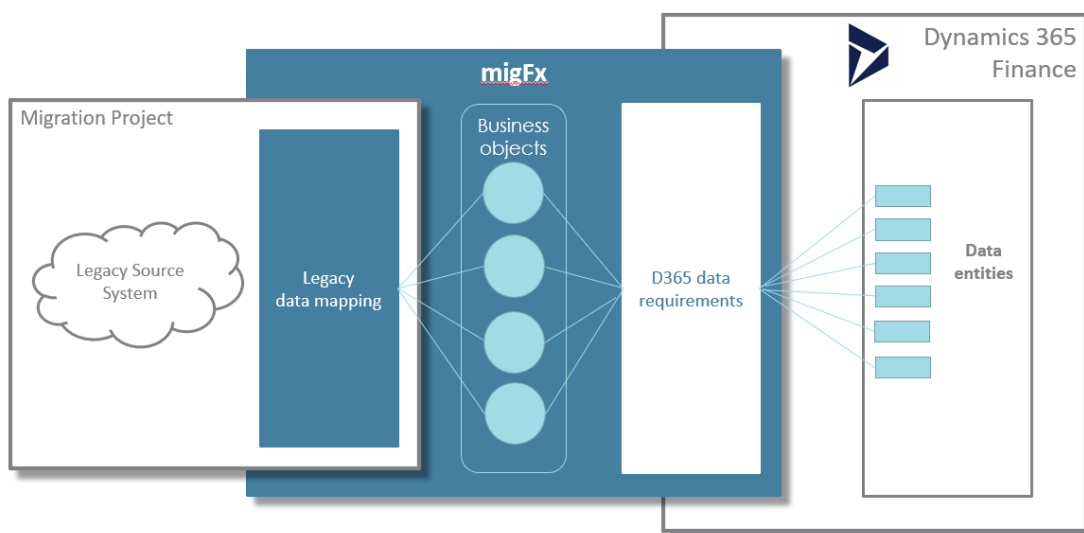


Figure: migFx links together legacy sources and D365

Validation is integrated and automated

migFx is built around the idea that all steps of data migration can be validated effectively before the data is presented to the target system. Specification, source data, converted data and target results are all checked by the migFx validation rules. Any issues with specification are highlighted and possible corrections identified. Source data passes validation to qualify for extract. Converted data is checked. Only correct information is included into upload. migFx ensures delivery of the best quality of data and minimizes fixing issues in D365. This approach dramatically saves time and effort during data migration and user acceptance testing.

Control of migration execution

When mapping is done the data migration can be executed. migFx provides tools to test migrate selected business objects: extracting source data, converting it and generating target results. All steps can be performed multiple times until required quantity and quality of data is met. Because results are stored in a staging database it is easy to fix issues. Preparation of data is done outside of D365 to minimize errors during upload.



Tracking and sharing results

Data migration is the teamwork of business users and consultants. Controlling the status of each step of migration and sharing results between all team members is essential. migFx provides a tracking portal which shows all team members to view the latest information about the data migration. Results are presented by business objects: how many records are migrated, how many had issues, details of errors. Project management can assess the progress of migration at any time.

Make your data migration successful

Do you want to see how migFx for Dynamics 365 Finance can make successful data migration for your implementation project reality? We promise you that technical complexity of data migration will be lifted from your shoulders. migFx will be that “magical tool” which allows to minimize costs and time of data migration, to engage business users and ensure quality of data, to control that critical information is delivered on time for go-live of your new system.

Making decisions and taking action

Knowing the status of data migration helps to concentrate efforts on most important tasks. Decisions are made fast based on full scope of information. Responsibilities are clearly defined between teams. Business users and consultants can take actions to fix issues and provide comments. History of all communication and activities is stored. Minimum time is wasted on communication through meetings, emails and documents. Fast decisions and actions accelerate progress of data migration.

What to do next?

We are happy to demonstrate capabilities of migFx. Please request a demo at info@hopp.tech.

If you want to read more about business objects and how they are used for data migration please visit our [website](#).

If you have specific questions about data migration, please talk to me - Elena Yakovenko – Elena.Yakovenko@hopp.tech.

If your data migration already has issues which require fast resolution, please book a free consultation at info@hopp.tech.

You are just one step away from making your data migration successful.

Read more about hopp tech and migFx on www.hopp.tech or contact us at info@hopp.tech.
