Dynamics Data Practice

DDPTech Data Migration Implementation – Phase 2

Who we are

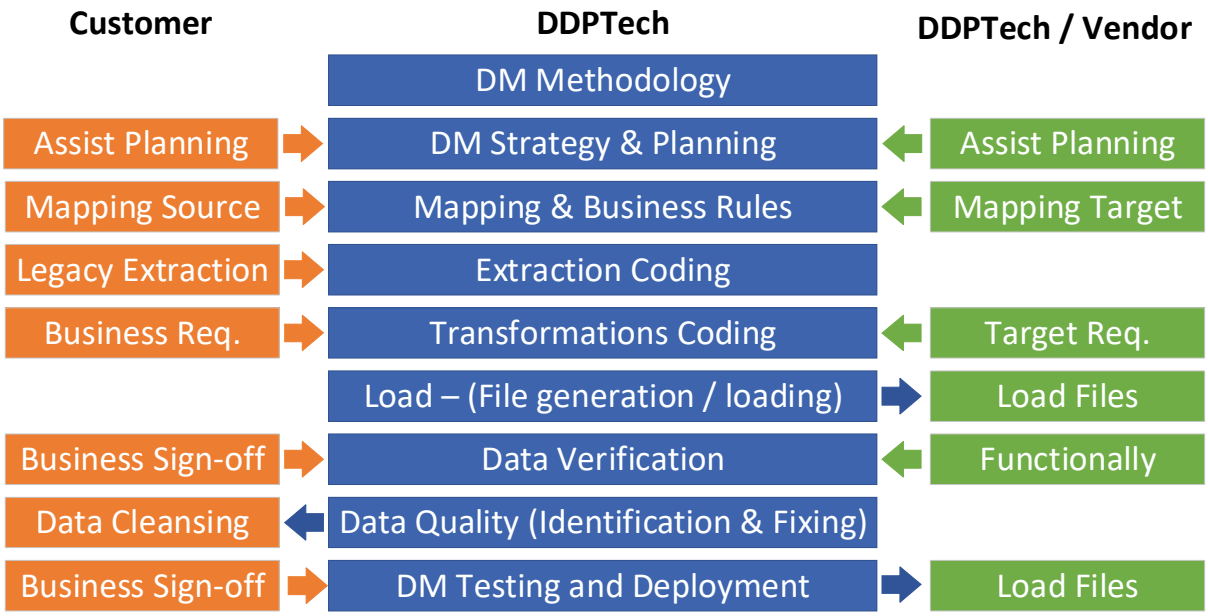
Dynamics Data Practice (**DDPTech**) is the collaborative result of two highly specialised MS Dynamics implementation partners coming together and forging a truly unique alliance. Data MC and LGS Pty Ltd have worked together on numerous and complex Dynamics implementations over the past 7 years. With Data MC's data migration methodologies, toolsets (DM REVOLVE) and resources, and LGS's Dynamics 365 architectural, functional and technical expertise, together **DDPTech** forms an essential bridge between the customer and the implementation vendor, specifically around data migration, production readiness and deployments.

The challenge

Data Migration (DM) is often categorized as the most precarious element of the overall Dynamics implementation. This well-deserved assumption is due to the risk of encountering legacy data quality issues, knowledge and expertise gaps, overall effort and resourcing requirements, the strict and unforgiving timeframes, and a need for a repeatable, predictable and timely data migration.

When it comes to customer verses vendor priorities, the customer is typically aiming to fulfil their business requirements to a high standard, incorporating their needs and wants, whereas the vendor's priority is aiming to complete the implementation as quickly and smoothly as possible. This difference is experienced no more critically than within the data migration arena.

The solution



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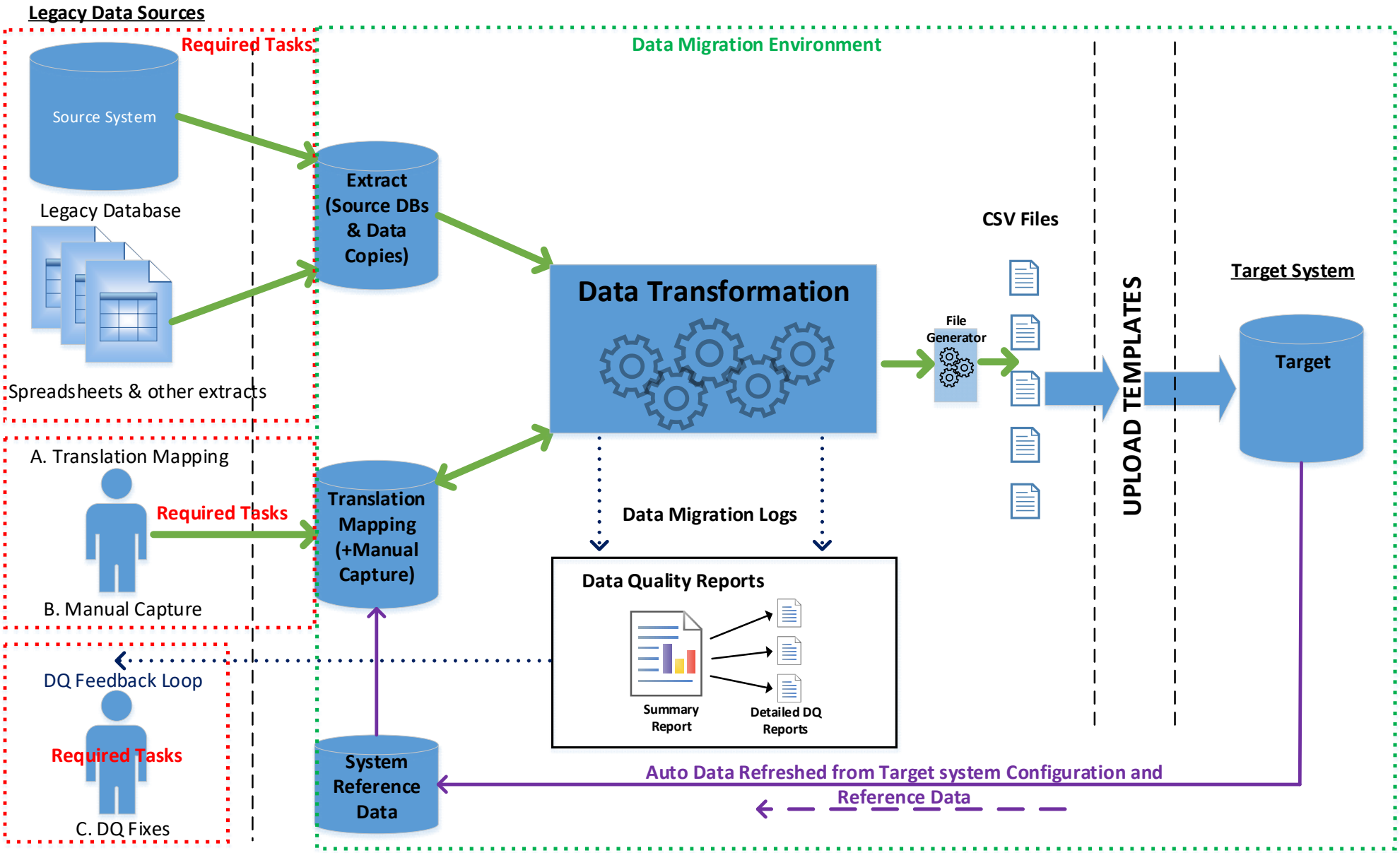
DM REVOLVE - Source to Target Concept Model



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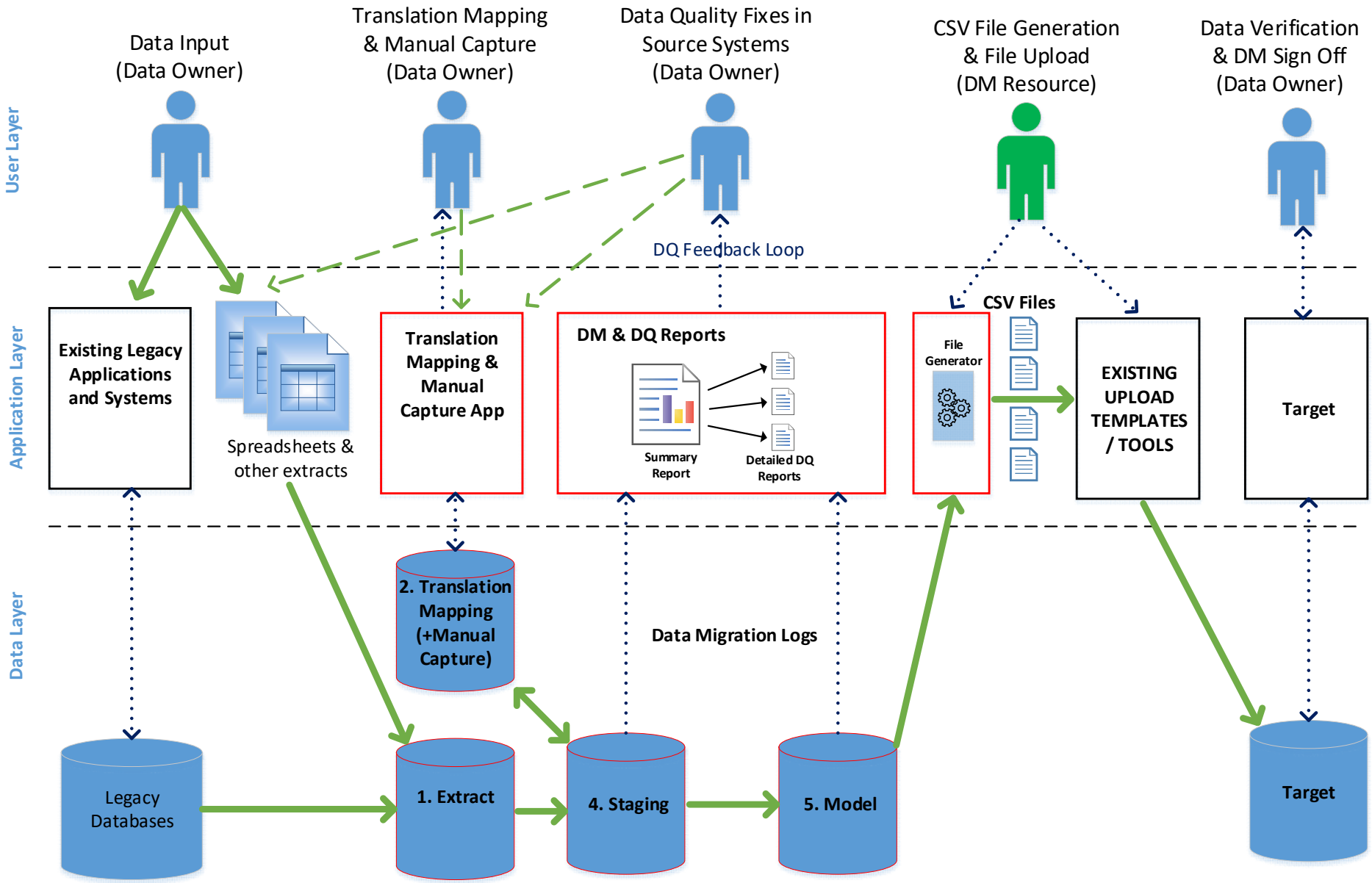
'DM REVOLVE' – Stakeholder Interaction Diagram



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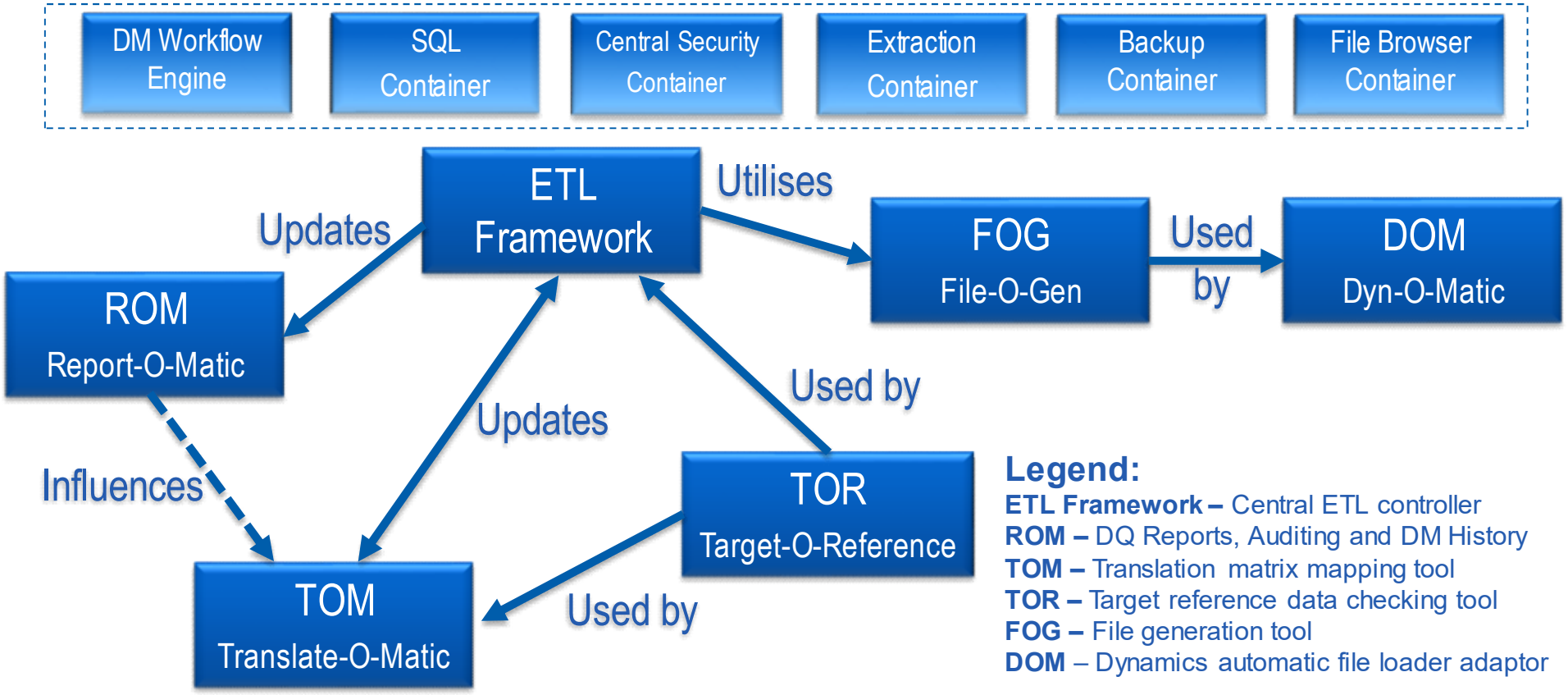
DMREVOLVE

DM REVOLVE

Rapid deployment 'fully integrated' docker containers



Legend:

ETL Framework – Central ETL controller
ROM – DQ Reports, Auditing and DM History
TOM – Translation matrix mapping tool
TOR – Target reference data checking tool
FOG – File generation tool
DOM – Dynamics automatic file loader adaptor

DM Implementation

The data migration implementation is the realisation of the DM planning and scoping exercise (**DDPTech Data Migration Planning and Scoping – Phase 1)**.

Guided by the DDPTech methodology, following the DDPTech DM Plan, using the DM REVOLVE toolset, and utilising DDPTech's expert resources, the client should have no other expectation other than a complete and successful implementation path towards their new Dynamics platform.

DM Infrastructure

DDPTech's technical expert resources will set up a secure Azure environment including the DM REVOLVE toolset. This environment is otherwise known as the DDPTech DTE (Data Transformation Environment).

There are two possible configuration options available for the DDPTech DTE:

1. A securely connected integrated environment coupled to the client's own network; or

2. A secure stand-alone DTE.

Our preferred option as it enables complete automation in a data migration sense, allowing full end-to-end migrations to occur *daily*, is **Option 1**. In this configuration, our automated extractions of the data sources can occur nightly, feeding information directly into DM REVOLVE.

This allows for daily* data migration:

- monitoring,
- data transformation mapping,
- data quality assessments, and
- target system loads

*** To date, typical data migrations have been limited to a small number of iterations, relying on the 2-3 trial migrations to test the end-to-end process**.

Mapping and Business Rules

DDPTech's business expert resources are available to assist the client efficiently map their data migration requirements into DDPTech's *primed* mapping specification documents. This exercise has been proven to be most efficient when conducted as a joint exercise between the client's business subject matter experts and DDPTech data migration expert resources.

DM REVOLVE Configuration

Utilising the completed and signed-off mapping and specification documents DDPTech's technical expert resources will complete all necessary configuration back into DM REVOLVE. This will include:

- Extraction of source system information
- Configuration of required data objects within the migration transformation
- Set-up and population of the translation matrices (old-to-new mappings)

- Integrated data quality checks and reporting
- Required output meta-data configuration
- Full end-to-end data migration workflow configuration

Data Verification

DDPTech's business expert resources will assist the client with all aspects of the formal data verification process. Including:

- Source-to-target record count comparisons
- Field-to-field mapping verification
- Business rule implementation verification
- Translation mapping verification
- Migrated data functional testing
- Financial reconciliation
- Audit compliance
- Migration sign-off

Data Quality

DDPTech business and technical expert resources will assist the client with all aspects of data quality including cleansing, enrichment and improvement.

DM REVOLVE incorporates dedicated toolsets for the identification and improvement of data quality issues. These tools are designed with web-based user-interactive interfaces for the explicit use, by the client business data owners, thereby fulfilling our own principles of maximizing the blending of business and technical effort.

Testing

Utilising DM REVOLVE's automated capability and the insight provided by our incorporated, web-enabled, interactive tools, data migrations are tested and monitored daily*

* **This automated, end-to-end, and business-integrated capability has never been a feature utilised within the world of data migration**.

Due to the abovementioned daily migration end-to-end runs, this means that the trial migrations can be reserved primarily as full, dress rehearsals for the Go-live events, testing all elements of the deployment, both business and technical.

Deployment

DDPTech's expert principal consultants are highly skilled at leading and delivering complex and challenging Dynamics data migration deployments. As an example, our principal consultants have successfully led one of the largest Microsoft Dynamics implementation projects attempted to date, encompassing several distinct projects and project teams, 150+ project staff and multiple project vendors and platforms. The data migration overlapped countless boundaries and successfully facilitated the rollout of Dynamics AX across an entire business division in the Asia pacific region.

Automation

DDPTech always strive to maximise the use of automation within their configured and tested data migration implementation solutions. This results in a predictable and measurable outputs, significantly reduced manual intervention, faster processing times for end-to-end execution, positively contribute to project timelines, and significantly mitigates the risk on the project imposed by legacy data migration. On larger implementations where production deployments / cutover across the business happen over multiple waves / phases this will truly become a repeatable process and has been seen many times to achieve significant savings by time, cost and risk.

Conclusion

DDPTech has a robust, industry-tested and projectized solution in place for planning, implementation and management of end-to-end data migration and deployment activities on large and complex projects. Together with the power of our unique DM REVOLVE toolset our custom-made approach has been proven to reduce costs, outlays and time, and more importantly, reduce the overall data migration project risk. These reusable and scalable resources and toolsets, including our unique methodology, significantly lowers the risks associated with having to start a new data migration process from scratch on each new Dynamics project.