1 - Data Migrations Checklist

The following is a semi-profanity-ridden attempt at explaining one way to do data migrations while following best practices. It is rather long and laced with colorful language. If you have read it already, or if you want to avoid the profanity, you can consult the following checklist in the *beautiful* table below.

Note that all elements are considered mandatory.

As a quick note, and a reminder even if you've read the whole version:

> DO NOT MODIFY SOURCE DATA FILES, EVER.

If you're doing data migrations, either use a script to modify the source files and save the edited version, or use excel workbooks that open the source file and then save the edited result elsewhere. Yes, even if the source is an excel file.

Why? Because sources change. People forget stuff, files aren't well formatted, shit gets broken, and people are human - meaning that one-time data import is actually going to be done multiple times. Edit the source file, and get to do everything all over again. Use scripts or workbooks to do the transformations ? Point that to the new source file and BAM Bob's your uncle.

Scripts you might want to use:

- OpenRefine
- SFXD's PSCSV
- Salesforce's official Data Migration Tool for cross-org data loading
- Amaxa for related objects, done by David Reed

Or, if you prefer excel, open a blank workbook, Import the source file via the "data" ribbon tab, select "from text/csv" (or whatever matches based on your source type), then save it as both:

- the construction excel,
- a NEW csv file after doing your changes in formula columns.

That way when you change the source file you can just open the construction book again and resave.

Action	Completed?
DO YOU HAVE A BACKUP	
Is it UTF-8 encoded	

Did you check it is readable and well formatted	
Does it have carriage returns stored as carriage returns, not as spaces	
Is it up to date	
Do you have a mapping for every object and field	
Did you determine an ExternalID for each object	
Did you determine source of truth (whether to overwrite or not) for reach field	
Did the client sign off on the mapping	
Do you have the source data	
Is it in a format your tool can read	
Are dates and date-times well formatted (yyyy-mm-dd || yyyy-mm-ddT00:00:00z) and are times exported in UTC	
Are field lengths respected (emails not longer than 80 chars, Names not longer than 40, etc)	
Do numbers have the right separators	
Do all tables have the required data for loading (Account Name, Contact Last Name, etc etc etc)	
Do all fields that have special characters or carriage returns have leading and trailing qualifiers (")	
Do all records have an external Id	
Did you do a dummy load with only one field mapped to make your sure tool can read the entire file	
Are you doing transformations	
Did you document them all	
Did you automate them so you can run them again with a click	
Did you read the LDV guide if you are loading more than 1M records	
Did you activate validation rules bypass	
Did you check all automations to deactivate any that should be, including email alerts	
Did you warn the client about when you would do the data load	
Did you warn the client about how long the data load would take	
--------- run the migration -----------	
Did you reactivate all automations	
Did you remove validation rule bypass	
Did you tell the client you were done and they could check	
Did you check the quality of the data	

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