Migrating to CiviCRM
What to expect, with lessons from recent migrations

Allen Shaw
JOINERY
http://JoineryHQ.com
What are we getting into?
What are the costs?
Estimating the costs
Estimating the costs

How many data sources?
Estimating the costs

How many types of records?
Estimating the costs

How clean is the data?
Estimating the costs

How hard is an export?
Estimating the costs

How will you make time?
Estimating the costs

- Number of data sources
- Number types of records
- Data cleanup
- Obtaining an export
- Your own time
How will we get there?
How will we *not* get there?
The story you’re about to see is based on actual events.
Plant Engineering and Maintenance Association of Canada

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PEMAC News
Full news view

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How will we get there?
Getting there
Getting there

1. The primary data expert
2. Document all data sources and use cases
3. Get intimate with CiviCRM
4. Establish export pathways
5. Review and analyze the data
5. Review and analyze the data

Getting there

6. Create a data mapping document
Getting there

7. Script the migration
Getting there

7. Script the migration
7. Script the migration
7. Script the migration
7. Script the migration
7. Script the migration
8. Review the migrated data
Getting there

9. Schedule the final migration
Other concerns
Other concerns

- Hosting and infrastructure
- Training
- Deduplication
- User accounts and permissions
- Integrations with other live systems
Checking in
Checking in
Checking in
Staff

Executive Director

Cindy Snedden

Education and Professional Development Manager
“When we originally moved to Avectra I did the database mapping myself from a relatively small, single spreadsheet. And it was HARD.

One of the reasons we’ve held on to Avectra so long is that I dreaded doing anything like that again with a much more complex db.

...
Checking in

...  

Thanks so much for demonstrating from the start that we could trust you with the details of this job. I think it's pretty remarkable that we got it in three tries.”

Cindy Snedden, Executive Director
Checking in

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Cindy Snedden, Executive Director
References

- “Organising Your Data”
  https://docs.civicrm.org/user/en/4.7/organising-your-data/overview
- “Importing Data into CiviCRM”:
  https://docs.civicrm.org/user/en/4.7/common-workflows/importing-data-into-civicrm/
- API CSV IMPORT GUI extension:
  https://civicrm.org/extensions/api-csv-import-gui
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