

# Data migration tips

Key takeaways for moving from Ellucian Advance Web to Ellucian CRM Advance



The data migration process is a complex undertaking that requires significant planning and resources to guarantee a smooth and seamless transition when moving from one system to another. Data must be analyzed, cleansed, and organized before it can be reconciled and combined to reduce inaccuracies, unknowns, and redundant and duplicate materials, and—ultimately—avoid perpetuating any hidden legacy problems or inefficiencies.

So, what's the best way to get started?

**Heather Campbell, Princeton University's executive director of analytics and data management,** offers her top tips for data migration.

## What system are you migrating from?

We are migrating from Ellucian Advance Web 9.10 to Ellucian CRM Advance. We have an on-prem data warehouse that feeds our reporting and business intelligence environment as well as many other of our custom web applications. We have more than 15 data feeds in and out of Advance Web. We have numerous campus partners with varying levels of Advance Web access. And we maintain our own giving sites, primarily for unrestricted giving and friend-groups giving sites.

## What is the structure of your team and what level of management was needed for the project?

Our department is in charge of the data foundation, technology, and flow of information for university advancement. We have a business intelligence team that develops dashboards and reports for our business partners, a web and application development team, and a data management team that maintains our data warehouse and oversees the migration of our data to the new CRM platform.

The project steering committee is comprised of our VP's of finance, advancement, and central IT. We meet with our committee regularly and are transparent about any roadblocks we're encountering. Maintaining this ongoing transparent communication is key in order to keep our stakeholders involved and maintain their support.

Our project management team including our Ellucian project manager, myself, and an additional staff member who serves as our functional lead helps to keep us on track. We also have an implementation team that is comprised of the lead from each of our functional teams. We found this support structure to be essential because there's so many moving pieces as well as business process change and functional decisions that have to be accommodated.

## What made this data migration different from previous moves?

We've been through several Advance Web versions in the past. However, this migration included a complete change in our underlying database and the application layer—requiring an increased level of data cleansing, analysis, and mapping.

## What are your top tips for data migration?

### 1 Cleanse your data and perform a gap analysis

The first thing that we did after deciding to move forward with CRM Advance was run data integrity checks. Through this process we were able to identify, correct, and populate missing data and ensure we had the right processes in place to migrate the data we wanted to preserve.

Additionally, Ellucian helped us identify the legacy table column mapping to the new CRM

entities. We discovered that a significant number of data was not mapped to the CRM. We identified these columns as nomad columns and did a further review to make sure that the data in these columns was still of value for us. If the data is not included in the native migration, we had to develop a custom migration, or decide if that data is acceptable to leave behind.

Ultimately, we decided that we wanted many of our custom fields to be part of the base end product. So, there were two solutions: (1) If there as a natural place for the data in the CRM we migrated that data to existing fields; and (2) if the data did not fit, we created custom fields or in some cases, custom tables.

### 2 Understand data semantics and mapping

There are semantic differences between CRM Advance and Advance Web. For example, in CRM Advance, entities mean a table, not a person or organization. And person entities in Advance Web are now called constituent persons in CRM Advance, and the same are called contacts in the database schema, allocations are renamed as designations, etc. This change not only impacts the terminology, but also where the data is mapped to.

We also learned that data from multiple Advance Web tables are now mapped to a single item. For example, gifts, pledges, and matching gifts now reside in a single table called contributions. Record status, mail control data, and other data are in contact preferences. All student and alumni activities are now called involvements. These instances of data consolidation change the experience for front-end users as well as how reporting is addressed.

### 3 Validate data migrations and run scripts

After running the cleanup scripts in Production, we took a snapshot of the Production database and created what we call the Fitgap database. The Fitgap database provides us with a true

picture of how the data looks on the day of migration and helps us compare the data in the two databases (Advance Web and CRM Advance) after the data is migrated. Fitgap also allows us to modify processes without affecting our production and reporting environment. In our case, we changed the way prospects and proposals are structured in our Fitgap database to pass to the CRM without impacting our legacy production environment.

Once you are ready to migrate the data, you will run a script which creates exact files of all the data. In our case we did all of that in our Fitgap database. Once you run data scripts and then create those files, you compress those files and then FTP them to a secured FTP site. Ellucian then takes that file and runs their transformation scripts and then migrates the data to CRM.

#### **4 Implement a business process review**

We also worked to document our business processes. We conducted prep-sessions to document our current process. This allowed us to better understand which processes were going to change after moving to CRM Advance.

In addition to the available on-demand training, we worked with Ellucian to hold additional “day in the life of” various functional staff (i.e., gift entry, prospect management, bio records, major gifts officer, etc.) to better understand the functional differences between the two platforms. This allowed us to make more informed business process change decisions, taking advantage of new best practices and efficiencies offered in CRM Advance.



### **Do you have any last words of advice for institutions undergoing a migration?**

The peer community is such a lifeline when going through this process. We are so grateful for what we have learned through this community, both the highs and the lows. It's a fantastic resource for shared learning.

Additionally, if you find functionality missing or features that would be useful for other schools, we would encourage you to create an Idea on the Ellucian Customer Center. Ideas allow users to submit product and functionality suggestions. Ideas are then promoted based on popularity with the community. Ellucian monitors the Ideas that come in and may include your suggestion in the baseline product.



## About Ellucian CRM Advance

Build and grow a strong culture of philanthropy at your institution with Ellucian CRM Advance, a robust cloud-based solution that lets you track and manage donors throughout the lifecycle. By incorporating data-backed insights into your advancement strategies, you can enhance your fundraising efforts to reach institutional goals while cultivating and maintaining stronger relationships with your constituencies. Visit us at [ellucian.com/crm-advance](https://ellucian.com/crm-advance) to learn more.



Charting the digital future of higher education with cloud-ready technology solutions and services, Ellucian serves more than 2,700 customers and more than 26 million students in over 50 countries. To find out what's next in higher education solutions and services, **visit Ellucian at [www.ellucian.com](https://www.ellucian.com)**.