

Tips for a successful RFS data migration

Introduction

As described in [Elements RFS Implementation: Standard Data Migration Process](#), our standard process for RFS data migrations allows for up to:

- 2 phases:
 - an initial import of data required for a pre-award launch (budget categories, organisations, and if required classification and initial funding opportunities)
 - followed by a full import of proposals, projects and associated data
- 2 imports to your test site and a final import to production per phase, and
- 2 iterations of file validation and feedback per import.

For a successful data migration we will work in collaboration with your project team. A summary of the steps involved and responsibilities can be found in Section 3 of the [Elements RFS Implementation: Standard Data Migration Process](#) document.

We are able to offer additional support if required, the detail and cost of which can be agreed during preparation of the data migration statement of work.

The purpose of this document is to help you as the client to plan your own migration activities and to provide context to support decision making.

Good Practice Recommendations

Data migration is an important part of your RFS implementation project. It's easy to underestimate the effort required from your team, which will be influenced by the scope of your migration, volumes of data, data quality, and fit with RFS.

To improve the outcome of your RFS migration, we recommend that you:

- **Start early**
Rushing the production of source files for an approaching deadline is likely to lead to data issues and further delays or later clean up.
- **Identify all data sources**
Additional data identified for import after the original migration is complete will require a separate migration exercise and incur further cost.
- **Think about how the data will be used**
Is it required for on-going processing / reporting, or visual reference? Data only required for

visual reference may be included in documents.

- **Exclude**
 - poor quality data that cannot be fixed
 - anything not required for on-going processing or meaningful reporting.
- **Cleanse data**

Leave plenty of time for data cleansing prior to import. If issues are identified after import, it may be complicated to fix them in RFS, and may incur additional cost.
- **Consider archiving old data**

Importing poor quality data or data no longer used can have an impact on the user experience and the accuracy of your reports. Consider an off-system archive for data that needs to be retained, but is unlikely to be used.
- **Validate your files**

It will save significant time and effort if you validate your files for completeness, accuracy and consistency before sending them to us for import.

The following table provides a checklist of the most common validation issues.

Validation Checks

Performing validation checks before finalising your files will improve the data quality in the files and minimise the number of iterations of validation and feedback. The following tables provide a checklist for catching the most common validation errors.

• All file headers match those listed in the file formats	Case sensitive	
• No duplicate entries		
• All mandatory fields are populated		
• All list fields contain valid values	Case sensitive	
• All dates are formatted correctly	yyyy-mm-dd	
• Related dates meet validation criteria	<u>Funding Opportunities</u> Internal open date < Internal close date < Internal approval date	
	<u>Proposals and Projects</u> Start date < End date	
	<u>Projects</u> Status of open projects is consistent with project dates	
	- Start Date in future	status = Pending Start Date
	- Start Date in past, End Date in future	status = Active
	- End Date in past	status = Complete
	<i>Status should be correct as at the date of export. The RFS import will adjust status where dates fall within the migration timeline.</i>	
• Budget totals are consistent	Total of budget amounts for a proposal = Total amount applied for from Proposals file	
	Total of budget amounts for a project = Current Award from Projects file	
• All IDs referenced in sub files exist in the relevant source file	See table below for full list of IDs referenced in sub files	
• All user IDs referenced exist in Elements and RFS*	Users may be referenced in the following files:	
	<ul style="list-style-type: none"> - Proposals - Projects - Internal Collaborators - Budget Items (in limited circumstances) 	<ul style="list-style-type: none"> - Deliverables - Journals - Documents

**Proprietary ID is preferred over Elements ID due to consistency between the sites, however Proprietary ID is not held in RFS for local users. In the case of local users being referenced, either temporarily convert to automated feed users for migration purposes, or use Elements ID throughout and provide separate files per site.*

Identifier	Source file (must be unique)	Referenced in	
Classification ID	Classifications	<ul style="list-style-type: none"> ➤ Organisation Classifications ➤ Funding Opportunity Classifications ➤ Proposal Classifications ➤ Project Classifications 	
Category ID	Budget Categories	<ul style="list-style-type: none"> ➤ Proposal Budget Items ➤ Project Budget Items 	
Organisation ID	Organisations	<ul style="list-style-type: none"> ➤ Organisation Classifications ➤ Funding Opportunities ➤ Proposals ➤ Projects ➤ Partner Organisations 	
Opportunity ID	Funding Opportunities	<ul style="list-style-type: none"> ➤ Funding Opportunity Classifications ➤ Proposals ➤ Projects 	
Proposal ID	Proposals	<ul style="list-style-type: none"> ➤ Proposal Internal Collaborators ➤ Proposal Partner Organisations ➤ Proposal Budget Items ➤ Proposal Budget Amount Breakdown ➤ Proposal Classifications 	<ul style="list-style-type: none"> ➤ Proposal / Project Relationships ➤ Proposal Deliverables ➤ Proposal Journals ➤ Proposal Documents
Project ID	Projects	<ul style="list-style-type: none"> ➤ Project Internal Collaborators ➤ Project Partner Organisations ➤ Project Budget Items ➤ Project Budget Amount Breakdown ➤ Project Classifications 	<ul style="list-style-type: none"> ➤ Proposal / Project Relationships ➤ Project Deliverables ➤ Project Journals ➤ Project Documents
Budget Item ID	Budget Items	<ul style="list-style-type: none"> ➤ Budget Amount Breakdown 	
Deliverable ID	Deliverables	<ul style="list-style-type: none"> ➤ Proposal Documents ➤ Project Documents 	
Journal ID	Journals	<ul style="list-style-type: none"> ➤ Proposal Documents ➤ Project Documents 	