Migration Utilities
Reference Guide

July 2020

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MIGRATION UTILITIES

Migration Utilities Consolidation, Reformation and Accessibility

The Migration Utilities in Risk Assess have been consolidated and reformed as a single application, designed to transfer groups of User Defined Fields (UDFs), User Defined Objects (UDOs), emails, programs, enrollment rules, assignment defaults setup data and setup data types, from a customer's Test environment to their Production environment.
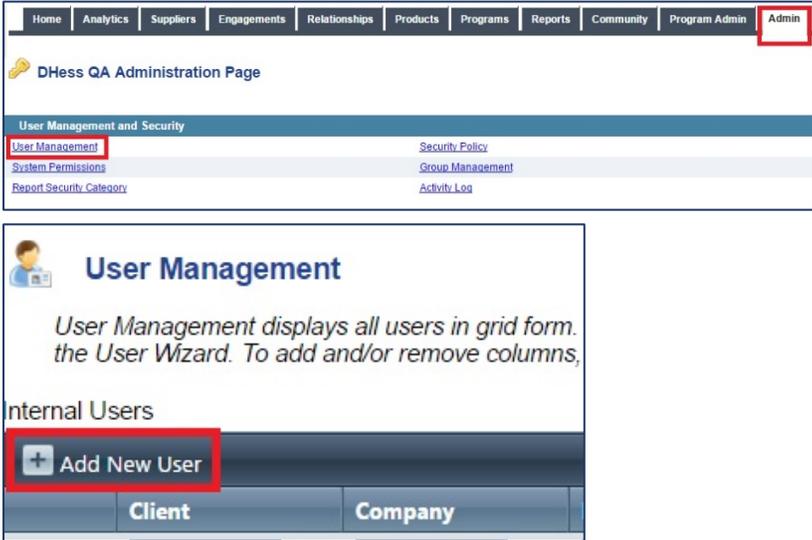
__NOTE__: By default, the Migration Utilities feature is disabled. Coupa Customer Support or Customer Success will provide support for the initial setup and use of this utility. To request activation of this feature, please submit a ticket to Coupa Customer Support.
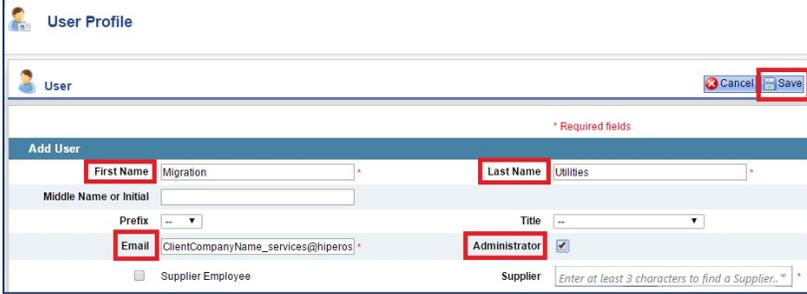
Risk Assess Access

The Migration Utilities feature requires not only that the user has Admin-level access to the application, but also is indicated as a member of the "Migration Utilities Admin" group under **'Group Membership'** in the logged-in user's Profile.

Activation of Migration Utilities

To create a migration manager and submit a request to Customer Support to activate Migration Utilities for its use, adhere to the procedure defined in the following table:

STEPS	DESCRIPTION
1. Create a user in both the Test and Production (Prod) environments who will serve as manager of migration. Under *Admin > User Management and Security > User Management*, provide the following user information: • First Name: Migration • Last Name: Utilities • Email: **ClientCompanyName_services@coupa.com** • Administrator: Indicate the checkbox.	

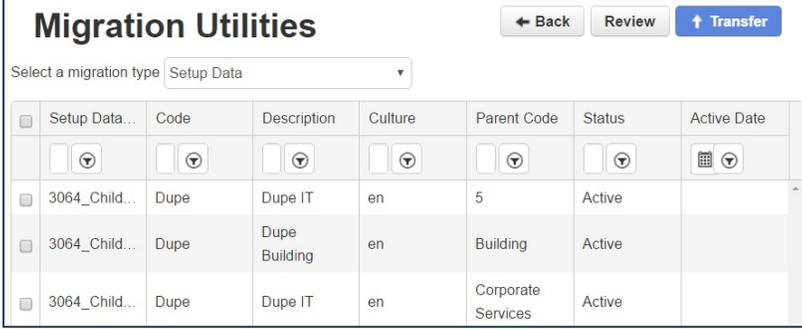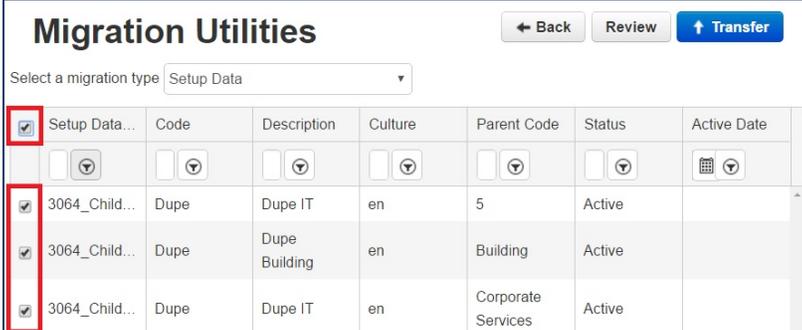| STEPS	DESCRIPTION
2. Click the **Save** button to save the user's information.	**NOTE**: Once the user is created, the userid will need to be edited so that the username goes from ClientCompanyName _services@coupa.com to ClientCompanyName_services (essentially, removing the @coupa.com suffix). If using SSO, add a generic SSO number to the Migration Utilities user.
3. Submit a Salesforce Case with Customer Support, specifically requesting "Please enable the Migration Utilities for [CUSTOMER NAME]'s TEST and PRODUCTION accounts." Please allow 3-5 days for this effort.	
4. Once activated, confirm that "Migration Utilities" is an active hyperlink under *Admin > Migration Utilities*.	
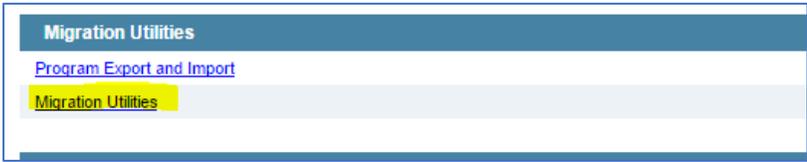
Performing the Migration Transfer

By default, the Migration Utilities feature is disabled. To request activation of this feature, please file a ticket with Coupa Customer Support.

To perform the Migration Transfer, adhere to the procedure defined in the following table:

STEPS	DESCRIPTION
1. Click the **Admin** tab, go to the 'Migration Utilities' section and click the **Migration Utilities** link.	
2. Click the **Select a migration type** dropdown menu and choose one of the available options. The corresponding selection grid will display. Users can sort, search and filter within this grid.	

STEPS	DESCRIPTION
NOTE: THE ORDER THAT OBJECTS APPEAR IN THE MIGRATION TYPE SELECTION LIST INDICATES THE ORDER THAT DATA SHOULD BE MIGRATED FROM THE SOURCE SYSTEM TO THE TARGET SYSTEM.	
3. Click the checkboxes located to the left of each object row to indicate one or more, or click the "Select all" checkbox located at the top, left corner of the grid in the column heading row. Users can continue selecting other objects across multiple migration types.	
4. Click the **Review** button at any time to see all objects that have been selected	
5. Click the **Transfer** button to begin the migration process. A final list of all objects to be transferred will appear as a 'Migration Transfer' pop-up window.	
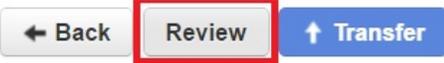
STEPS	DESCRIPTION

	Migration Transfer ✕
	
	Please confirm you wish to transfer. Click Process Now to schedule the transfer.
	
	3 objects selected
	   • Programs / (VCC) Certification Program.
	   • Programs / 3PM - AutoLogin Demo
	   • Programs / 3rd Party Due Diligence Questionnaire
	
	[Process Now] [Close]

6. Click the **Process Now** button at the bottom of the Migration Transfer pop-up window to confirm the objects for transfer and begin the transfer process. Or, click the **Close** button to close the window and return to the Migration Utilities page.	[Process Now] [Close]

STEPS	DESCRIPTION
7. If the Process Now button was selected for a migration type of "Programs," then the 'User Replacement' pop-up window displays. Under the "Please fill out all fields with user names for the destination" block, the user must replace the existing email addresses listed if they differ in the target (Production) to eliminate the risk of a broken workflow The user also needs to provide a <Program Manager> to assign to the programs.	**User Replacement** ✕ The following values were found in the items you are migrating. Please replace them with appropriate values that exist in your destination. If migrating programs, enter the desired program manager in the first row. *Please fill out all fields with user names for the destination.* Programs: <Program Manager> [ ] dimenna@hiperos.com [dimenna@hiperos.com] bdekker@hiperos.com [bdekker@hiperos.com] sbhide@hiperos.com [sbhide@hiperos.com] [Process Now] [Cancel]
8. Once the indicated object(s) has/have been transferred, an email is transmitted to the Admin user who initiated the migration. The email details the object(s) that has/have been transferred and whether or not its transfer was successful. One email is transmitted per migration type.	

NOTE: Due to the potential differences in data and configuration between customer Test and Production, the configuration for the following Program Component types does <u>not</u> migrate from Test to Production when programs are migrated. The configuration for these Program Component types must be updated following migration (*Admin > Program Management > Program Component Library*):

- Ad Hoc Report Viewer
- Add Organization Approver
- Create Relationship With Selected Supplier
- Download
- Dynamic Final Approval
- Engagement Match
- Launch Follow-up Program
- Program Launch
- Program Score
- Put Program Results In Field
- Report Download

- Relationship Match
- Robo Delete Open Supplier Programs
- Send Notification
- Supplier Match
- Workflow Check All Programs Complete
- Workflow Control Scoping
- Workflow Set Control Risk to Field
- Workflow Set Permissions

Customers should review all data / configurations that have been migrated to ensure all was migrated as expected. It is advisable to run an end-to-end test to confirm program workflows behave as expected, post migration.

Migration Best Practices

Following are best practice recommendation pertaining to the Migration Utility, including testing the feature before using it for a real migration of data:

- For customers with existing programs, the best practice with respect to utilizing migration utilities is to inactivate all programs in the Test environment, then push all of those programs from the Production environment down to the Test environment. For more information, contact Coupa Customer Success or Customer Support.
- Items must be migrated in the order of the 'Select a migration type' Setup Data Type options in the Migration Utilities dropdown menu.
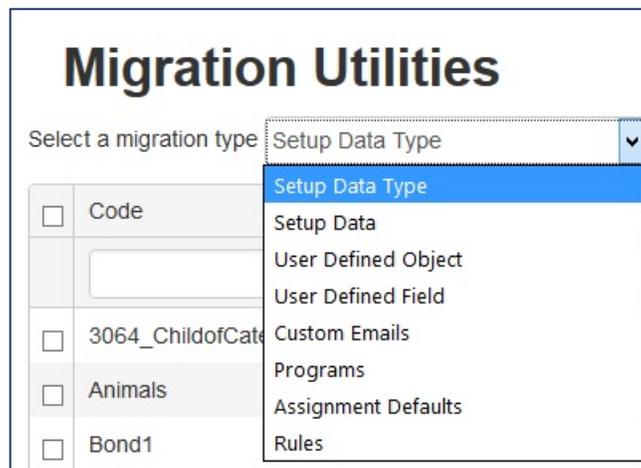
- **IMPORTANT**: Risk Assess does not permit duplicate Setup Codes within the same Setup Data Type. While there are no constraints on Display Names being unique within a Setup Data Type, users should avoid duplicate names. Prohibited Setup Data Code characters include most punctuation as well as the less than/greater than symbols (<, >).
- Risk Assess suggests completing a small migration first and confirming the migrated content.
- A transfer email notification will route to the user who initiated the transfer to provide the status of the integration transfer.
- All content migrated should be validated prior to activation.
- When migrating Programs, the Program Manager needs to be an Active user in Production.
- Programs will transfer over to the target environment in draft.

IMPORTANT: When migrating programs and programs with associated rules, the rules will ALWAYS migrate to the target environment as "Inactive" status and thus require activation upon migration.

Additional links under Admin > Migration Utilities

In addition to the Migration Utilities link, two additional links are available under the *Admin > Migration Utilities* section. These links include:

- Program Export and Import
- Custom Email Export and Import

NOTE: For existing customers that created a program earlier than the new Migration Utility functionality, the user can employ the Migration Utilities. When performing a manual migration for a program, the Migration Utility should not be utilized.

Program Export and Import

Risk Assess programs can be exported or imported via XML file from within the Program Export/Import page. In addition to the program configuration, this functionality exports the program component definitions that are associated with the program to an XML formatted file that can be used to import the program definition into a target system. This feature provides an option on the program import to allow the user to specify whether to update or overwrite existing program components.

NOTE: By exporting and importing a program back to the same tenant environment, the application will create a duplicate/copy of the program in draft status instead of updating the original program.

Please see "Program Export and Import" in the 'Program Administration' section of the Risk Assess Reference Guide for a complete description of these capabilities.

Email Test Import and Export

Customer Email text can be exported or imported via XML file from within the Custom Email Export/Import page. This menu option is employed by the user to export custom emails from Risk Assess and import the emails into the application via an XML file.

Please see "Custom Email Test Import and Export" under the 'Migration Utilities' section of the Risk Assess Reference Guide for a complete description of these capabilities.