

TEMPLATES

Data Migration Templates

Three working documents for a data migration: the mapping the business signs, the rollback plan decided before the night, and the cutover runbook timed from rehearsal.

How to use these

Each template has its columns defined, a short note on how to fill it in, and blank rows. Copy them into whatever tool your project uses; the structure matters more than the format. They go with the article *Data migration, stage by stage* on ethancorp.com, which explains the stage each one belongs to.

01	Source-to-target mapping	Mapping stage, signed before build
02	Rollback plan	Signed before the cutover window opens
03	Cutover runbook	Timed from rehearsal, used on the night

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01 Source-to-target mapping

What it is for: the contract the business signs. One row per target field: where its value comes from, the rule that produces it, what happens when the source is empty, and who approved it. Engineering implements it; it does not decide it.

DOMAIN / OBJECT

VERSION

STATUS

BUSINESS OWNER

APPROVED BY

DATE

ID	Source field	Source type	Target field	Target type	Rule type	Transformation rule	Default when empty	Test case	Status	Approved by
M-001	Account.Industry	Text	Account.Industry	Choice	Lookup	Lookup table L-03; default OTHER where no match	OTHER, flagged	T-001	Signed	Head of sales

Rule types: move (as is) · convert (type or format) · lookup (code translation, name the lookup table) · derive (computed from several fields; needs business sign-off) · default (no source).

Status: Draft · Draft-AI (proposed by a model, not yet reviewed) · Reviewed · Signed. A Draft-AI row goes through the same review and sign-off as any other. **Shaded row:** a fictional example from the article's worked example.

Before sign-off: every rule checked against the values profiling found, not the data dictionary; unmapped fields in both directions brought to zero by decision; no row left undecided.

02 Rollback plan

What it is for: the way back, decided, rehearsed and signed before go-live, so the choice between pushing on and rolling back is not made under pressure in the middle of the night.

Window and decision

CUTOVER WINDOW

POINT OF NO RETURN

DECISION OWNER

BACKUP DECISION OWNER

Triggers

Trigger	Threshold (a number or a time)	Measured by	Action	Who decides
Milestone not reached		Runbook step	Roll back	
Unexplained variance		Reconciliation, layer 3	Roll back	

Rollback procedure

#	Step	Owner	Duration from rehearsal	Verified by
1	Stop user access and integrations to the new system			
2	Reopen the source (untouched during the load)			
3	Replay or log writes made in the new system since go-live			

After the point of no return: roll forward

FIX ROUTE FOR DATA DEFECTS

WHO APPROVES A DATA FIX

Rehearsal record and sign-off

Date	Rollback path run end to end?	Duration	Issues found

Role	Name	Signature	Date
Executive sponsor			
Migration lead			
Business owner			



03 Cutover runbook

What it is for: every step of the cutover in order, detailed enough that a stand-in could run any step. Durations come from rehearsal, never from estimates. Each step says how it is verified and when to stop.

WINDOW OPENS	WINDOW CLOSSES	HARD-STOPS
GO / NO-GO TIME	DECISION OWNER	BRIDGE OR CHANNEL

#	Phase	Step	Owner	Backup	Planned start	Duration (rehearsal)	Verification	Stop condition	Done at	Initials
1	Prepare	Confirm go to start: people, access, rollback plan signed								
2	Freeze	Freeze writes to the source; confirm no job still writes								
3	Extract	Final delta extract from the source								
4	Load	Load to the target from staging								
5	Reconcile	Run the full reconciliation (one command); compare with thresholds								
6	Verify	Security checks; named users verify their own records								
7	Decide	Go / no-go against the signed criteria								
8	Switch	Point integrations and user access at the new system								
9	Announce	Tell users and support that the new system is live								
10	Hypercare	Start hypercare monitoring and daily reconciliation								

Steps: the phases above are a skeleton; split each into the real steps from your rehearsal. Add the rollback branch as its own steps, starting from the stop condition that triggers it.

Before the night: at least one full rehearsal on full volume with the same people, timings recorded in this sheet, and the rollback path run at least once.

How the three fit together

The mapping is signed at the end of the mapping stage, and every defect found in testing is fixed there first, then in code. The rollback plan is signed before the cutover window opens, by the person who will hold the decision. The runbook is rehearsed on full volume until it fits the window, and its timings come from those rehearsals.

Five questions for any migration plan

- 1 Which profiling report is this estimate based on?
- 2 Does each transformation rule cover the values the data actually holds, and who signed the derivations?
- 3 Which full-volume run do the runbook timings come from?
- 4 At what variance and by what time does someone roll back, and who decides?
- 5 How long does it take to rerun the full reconciliation?

Integration & Migration Review

If a migration is coming and you want an independent read before you commit to a date, the Integration & Migration Review is a fixed-scope review built for that point. EthanCorp designs and runs data integration, analytics and AI automation systems for organisations that need their fragmented data to be trustworthy, built as durable systems, not demos. The review profiles your source systems as they actually run today, ranks the failure points by business impact, and produces a first source-to-target mapping for the domain that matters most.

[Book a review →](#)