ClearCase to Helix Core Migration Planning Checklist

Congratulations on taking the first step to migrate from ClearCase to Helix Core. This checklist contains information on some of the considerations necessary to make your migration timely and successful from the beginning.

ClearCase to Helix Core migration projects vary greatly vary in size, complexity, geographic distribution, and integrations with other systems. Small, simple environments with basic requirements are typically migrated in less than two weeks. It includes setting up Helix Core, migrating, and training users and administrators. Large, complex ClearCase environments might perform a series of migrations over several months or more because individual teams migrate at different times.

Evaluate ClearCase

☐ **ASSESS CLEARCASE USAGE**
Determine what features are in use (labels, etc.) and decide how to implement them in Helix Core. Check for structural corruptions, such as "evil twin" files.

☐ **CHECK OUT TOOLS, PROCESSES, AND INFRASTRUCTURE**
Review your current ClearCase system and look at how tools and workflows interact with the server. In Helix Core, you might decide to replace certain ClearCase functionality, change implementations, or abandon unneeded components.

☐ **CONSIDER USER INTERACTIONS**
Define the various users and groups that interact with ClearCase and assess the impact a migration will have on each one.

☐ **DEFINE YOUR MIGRATION REQUIREMENTS**
Consider the amount of history that must be available in Helix Core after the migration. When auditing, what records are required? How far back do they need to go?

Determine a Branching Strategy

☐ **REVIEW YOUR EXISTING BRANCH STRATEGY**
Determine whether the branching strategy that you used in ClearCase is appropriate to use with Helix Core. This could vary by team.

☐ **CONSIDER PERFORCE STREAMS**
Streams is a framework for projects in Helix Core that is based on industry best practices. It simplifies work for your end users, and makes project and release management easier.

Map Your New System

☐ **PLAN YOUR DIRECTORY STRUCTURE**
Your directory structure conveys branch structure and product lifecycle information. After you identify a branching strategy, you can map it to a high-level directory structure to be used in Helix Core. We recommend the Perforce Directory Standard (PDS).

☐ **DEFINE RELEASE PROCESSES AND STANDARDS**
Think of the directory structure in Helix Core as having low and high levels. Low levels contain your software products. High levels define branching structure, project management, and software lifecycle information. The high-level structure encourages consistency in release processes for various software products, but is also flexible. To minimize the difficulty and impact of migration, the low levels of the directory structure (for example, build scripts and release processes and tools) are untouched.

☐ **SELECT A DATA CONVERSATION STRATEGY**
For each VOB, decide whether to import all history, selected history, or only the most recent revisions. For more information, review the ClearCase Migration Guide.

Secure Your Property

☐ **ADDRESS INTELLECTUAL PROPERTY CONCERNS**
Your migration process must provide a clear audit trail so files can be traced back to the original ClearCase repository. Review your access control policies and ensure sensitive information is controlled as well as it was in ClearCase.

Build Your Adopters

☐ **ESTABLISH A TRANSITION TEAM**
Creating a core group¬ — including application administrators, system administrators, and other influential users — helps define how Helix Core will be used in your organization. This group can refine your various processes and workflows, and decide how to integrate Helix Core with other systems.

☐ **CONTACT PROFESSIONALS**
At Perforce, our team of professional services is here to help you through your migration. We can be a valuable part of your transition team.

☐ **SCHEDULE TRAINING**
It is most effective to train your users a few days or weeks before the cutover to Helix Core. To ensure a smooth transition, start with Helix Core administrators.

Cutover to Helix Core

☐ **SELECT YOUR FIRST PROJECT**
Picking the right pilot or project to migrate first is critical. Choose a project that has a good chance of success, but not one that is so simple or trivial that it does not represent the remaining migration projects.

☐ **REVIEW THE FIRST PROJECT**
Go over what went well and what didn't. Make any necessary changes and if you want to test things again, repeat on another project.

The Professional Services team at Perforce has extensive experience migrating complex ClearCare environments to Helix Core. They can ensure your migration goes smoothly. For more information, visit www.perforce.com/support/consulting/helix-core-consulting or email consulting@perforce.com.