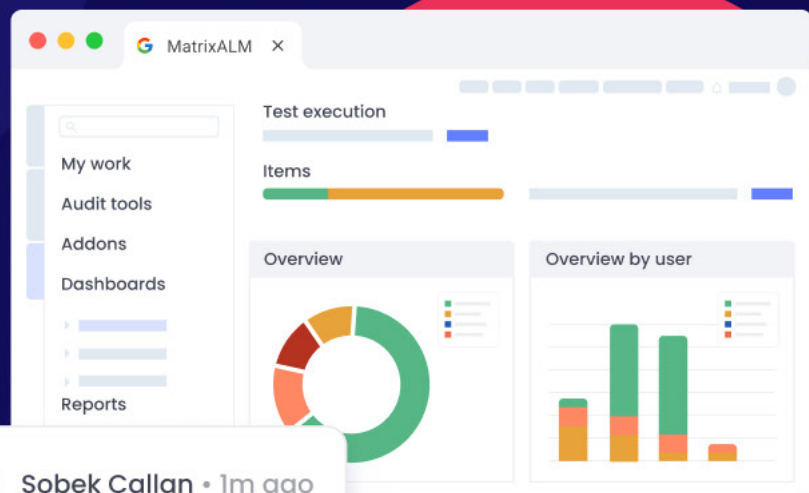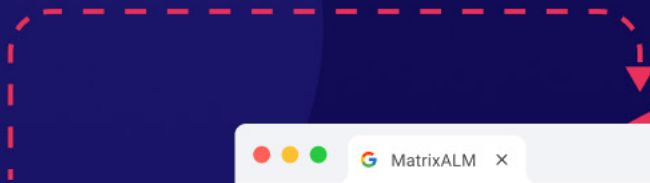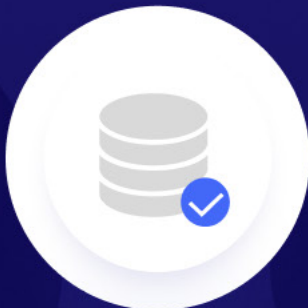# matrix
requirements

ALM Migration
made simple

A guide including a step-by-step migration process, timelines, and best practices when switching your ALM to a more robust solution like Matrix Requirements.

G MatrixALM ✕

Test execution

Items

My work
Audit tools
Addons
Dashboards

Reports

Overview

Overview by user

Sobek Callan • 1m ago

Migration complete 🙌

Table of Contents

ⓘ Introduction

Migrating to a new Application Lifecycle Management (ALM) system is far from straightforward, especially when transitioning from another ALM tool. Imagine moving thousands of test cases to the new system, only to find that some critical requirements were not transferred correctly, leading to incomplete or incorrect test executions; or, if post-migration an integration your team relies on fails halting automated builds and deployments, and causing significant project delays. With so much at stake, it's important to work with vendors who can ensure migration success.

This guide will walk you through the necessary steps, why each step is important, and how long each step could take. By the end of this guide, you'll have a clear understanding of what needs to be done to ensure a smooth transition to MatrixALM.

Three key considerations before migrating

Before switching to a new ALM system, it's important to think through several key factors to ensure everything goes smoothly. First, take a look at your current project deadlines and milestones to avoid any disruptions during critical phases or product launches. Secondly, make sure the new system meets all regulatory and compliance requirements and plan for any necessary audits, especially if you have one coming up soon. Lastly, estimate potential downtime and have a plan in place to keep business operations running smoothly.

[Download ALM checklist]

Migration time frame estimates

Estimating the exact time required for an ALM migration can be challenging due to various factors, such as data complexity, customization, and integration requirements. It's essential to leave some buffer room in your schedule to accommodate unforeseen issues and ensure a smooth transition. Consulting with your ALM vendor can provide a more accurate time frame based on their experience and expertise. Below are some example scenarios to give you an idea of potential migration timeframes.

Fast Migration (4-6 weeks total)

The simplicity of the data and system setup, along with fewer customization and integration requirements, enables a quicker migration process.

Scenario

- Small company with a simple ALM setup and clean data.
- Standard data fields with minimal customization.
- Basic integrations with a few popular tools.
- Users with basic training needs.

Long Migration (12-16 weeks total)

The complexity and volume of data, coupled with extensive customization and integration needs, require a more extended migration period to ensure accuracy and completeness.

Scenario

- Large enterprise with a complex ALM setup and large volumes of data.
- Extensive custom fields and unique data structures.
- Complex integrations with multiple bespoke tools and systems.
- Users require comprehensive training and extensive documentation.

↑↓ Step-by-step migration process

Initial assessment

> **Duration:** 1-2 weeks
> **Purpose:** Understand the scope, complexity, and volume of the data to be migrated.

When you're ready to migrate, it's crucial to take time to understand the scope, complexity, and volume of the data that you will need to migrate. We've all been there in some form or another, whether furniture shopping, appliance shopping, or even plant shopping, where we suddenly realize an oversight, preventing us from taking the next step. In those scenarios, there isn't as much at stake, you can go back home, re-evaluate, and then go back. But when it comes time to upgrade your current Application Lifecycle Management (ALM) tool for a more robust solution, you can't afford delays.

A newer business with one product might have significantly less data that needs to be migrated, or alternatively, may have so many complex requirements or special customizations, that migrating the data could be challenging.

Leverage our ALM checklist to ensure you're migrating to the best ALM solution.

Best practices

- ☐ **Conduct meetings with stakeholders** to gather requirements and expectations.

- ☐ **Review the current ALM** system's data structure and usage patterns.

- ☐ **Identify all types of data that need to be migrated** (e.g., requirements, test cases, defects, user stories, etc.).

- ☐ **Assess the volume of data** to estimate the effort and time required.

- ☐ **Determine any special requirements**, such as data security, regulatory compliance, and specific customizations.

> " Unlike some of the other platforms we considered, MatrixALM is hosted in a secure data center located in Europe, which helps us to ensure that we meet requirements such as the European Union General Data Protection Regulation [GDPR].
>
> **– Marco Milani, Project Manager**
>
> TECRES

Data mapping and planning

Duration: 1-3 weeks
Purpose: Ensure that data fields in the old ALM map correctly to fields in the new ALM.

(?) Switching to Matrix Requirements?

A dedicated Success Manager will review your data, collaborate on structuring ideas to determine the best import structure for you, then when alignment is reached, we will create a sample Excel sheet for you to get your data imported.
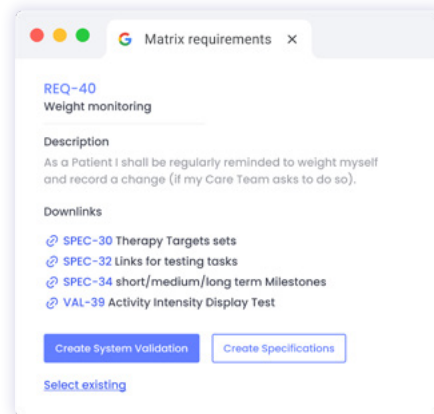
In the data mapping and planning phase, ensuring that all data fields in the old ALM correctly map to the new system can be a significant challenge. This phase often uncovers discrepancies and incompatibilities between the two systems, such as custom fields or unique data structures that require special handling. An example of this could be that your current ALM tracks test case priorities with a custom field, but the new ALM uses a different method resulting in teams needing to create a complex mapping plan to convert these fields correctly.

Additionally, incomplete or poorly documented data in the existing system can complicate the mapping process, leading to potential data loss or errors during migration. Aligning the migration plan with business requirements and regulatory standards adds another layer of complexity.

Best practices

- **Create a data mapping document** that outlines how each data field in the old ALM maps to a corresponding field in the new ALM.

- **Identify any discrepancies or gaps** between the two systems' data structures.

- **Plan for handling custom fields or unique data structures** that do not have direct counterparts in the new ALM.

- **Establish a clear plan for data transformation**, including any necessary data type conversions or format changes.

- **Consult with data experts and stakeholders** to ensure that the mapping plan meets all business requirements.

Data extraction

Duration: 1-2 weeks
Purpose: Extract data from the old ALM system.

? Switching from an alternative ALM?

Unlike many vendors, Matrix Requirements believes in data portability and making it easy for you to export your data whenever you want to switch to another provider. Our team will work with you to find the best method for data extraction from your existing tool.
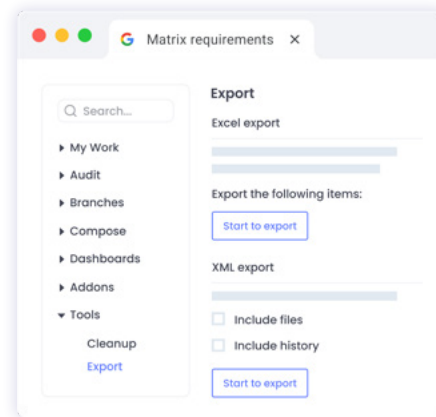
During the data extraction phase, technical limitations and complexities of the existing ALM can pose significant challenges. Data may be stored in various formats or fragmented across multiple databases, making cohesive extraction difficult. Proprietary or legacy systems may not support straightforward data export, requiring custom scripts or specialized tools. Ensuring data integrity during extraction is critical, as any errors or omissions can lead to significant issues in later stages. Handling large data volumes efficiently to minimize system downtime and disruption is also a common concern.

Best practices

- [ ] **Use available data extraction tools** or develop custom scripts to pull data from the old ALM system.

- [ ] **Ensure data extraction scripts are thoroughly tested** to avoid data loss or corruption.

- [ ] **Address any issues related to data encryption or fragmentation** to ensure complete data extraction.

- [ ] **Maintain a backup of the extracted data** to prevent any loss during subsequent steps.

- [ ] **Document the extraction process** to facilitate troubleshooting and future reference.

Data transformation, cleansing, and loading

Duration: 2-4 weeks
Purpose: Cleanse and transform data to fit the new ALM system's requirements.

(?) Switching to Matrix Requirements?

Loading data in Matrix is quick and easy and can be accomplished in a few clicks. Leverage our free plug-in, Relink available in the Matrix Marketplace. This plug-in enables you to retain all your external links and traces using Microsoft Excel. It can handle a variety of data types too, like checkboxes, dropdown fields, and radio buttons. Whatsmore, it also keeps links intact for your external tools, like Jira, GitHub, gitLab, and more.

The data transformation, cleansing, and loading phase is often complicated by the need to ensure data consistency and accuracy. Data from the old ALM typically requires significant reformatting, such as changing data types or merged fields, to match the new system's structure before being imported into the new system. Mismatched data types, missing fields, or import errors can cause significant delays if not meticulously managed. Additionally, data quality issues such as inconsistencies, duplicates, and incomplete entries are common, requiring thorough cleansing to meet the new ALM's standards. For example, you may discover multiple entries for the same defect but with slight variations in descriptions and statuses that need to be merged and standardized. Aligning transformed data with current business rules and compliance requirements adds further complexity. Think of this stage as spring cleaning.

Best practices

- [ ] **Perform data cleansing** to remove any duplicate, outdated, inconsistencies, or irrelevant records.

- [ ] **Transform data** to match the new ALM system's structure, which may involve changing data formats, renaming fields, or merging datasets.

- [ ] **Use automated data transformation tools** where possible to speed up the process.

- [ ] **Perform data import in stage**s to manage and mitigate risks associated with large data volumes.

- [ ] **Address any errors or issues promptly** to minimize disruption.

- [ ] **Document the data loading process** for future reference and troubleshooting.

Integration with existing systems

Duration: 2-4 weeks
Purpose: Ensure the new ALM integrates seamlessly with other tools and systems used by the customer.

Integrating the new ALM with existing systems can be particularly challenging due to compatibility issues and the need for custom **integration solutions**. The new ALM must work seamlessly with other tools and systems used by the organization, such as CI/CD pipelines and issue trackers. Ensuring that these integrations are properly configured and tested is critical to avoid disruptions in workflows. Compatibility issues, such as different data formats or communication protocols, can complicate the integration process and require significant adjustments.

Best practices

- ☐ **Identify all systems that need to be integrated** with the new ALM (e.g., CI/CD pipelines, issue trackers, project management tools).
- ☐ **Develop integration plans and workflows** to ensure seamless data flow between systems.
- ☐ **Configure and test integrations** to ensure they work as expected.
- ☐ **Address any compatibility issues** or customization requirements.
- ☐ **Provide documentation and training** on the integration process to relevant stakeholders.

> " If an issue arises—for example, a piece of software failing a test case—we use the integration between MatrixALM and Jira to track the defect. The ability to keep MatrixALM and Jira updated automatically brings big efficiency benefits, and our test manager greatly appreciates the ability to use built-in reporting in the Matrix Requirements solution to track the status of test cases.
>
> **– Laetitia Gervais, Director QA/RA**

ACUSURGICAL

Testing and validation

Duration: 1-3 weeks
Purpose: Verify that data migration is accurate and complete, and the system works as expected.

? Switching to Matrix Requirements?

Our highly rated and rapid support team are available to help you if you run into any issues along the way.

The testing and validation phase often uncovers issues that were not apparent in earlier stages, such as data integrity problems or system performance issues. For example, user stories and tasks might not be mapped correctly for edge cases and require more data mapping logic rules. Comprehensive testing is essential to ensure that the migrated data is accurate and the new ALM functions as expected. However, this can be resource-intensive and time-consuming. Engaging end-users in testing is crucial to identify usability issues, but coordinating their involvement and addressing their feedback can be challenging. Ensuring thorough testing and timely resolution of identified issues is critical to a successful migration.

Best practices

☐ **Develop a comprehensive testing plan** that covers all aspects of the migration.

☐ **Conduct unit tests, system tests, and user acceptance tests** to validate data accuracy and system functionality.

☐ **Engage end-users in testing to identify any issues** from a user perspective.

☐ **Document and address any defects or issues** identified during testing.

☐ **Perform a final validation** to ensure all data has been migrated accurately and the system is fully functional.

User training and documentation

Duration: 1-3 weeks
Purpose: Train users on the new ALM system and provide necessary documentation.

(?) Switching to Matrix Requirements?

Every account gets user training as part of their onboarding and access to the Matrix University to access content to help your team get up and running fast. In addition, you will have the opportunity to sign up for free expert insights meetings with your dedicated success manager. These meetings are a goldmine for maximizing your product experience and are entirely customized to your instance and needs.

During the user training and documentation phase, ensuring that the documentation is user-friendly, accessible, and that all users are adequately trained is crucial. Diverse user groups with varying levels of technical expertise and familiarity with the old system can make it difficult to design a one-size-fits-all training program. Some users may resist the change due to comfort with the old system or fear of learning a new one, leading to lower adoption rates and productivity dips.

Best practices

- [ ] **Develop training materials**, including user guides, video tutorials, and FAQs.
- [ ] **Organize training sessions, workshops, or webinars** for different user groups.
- [ ] **Provide hands-on training** to ensure users are comfortable with the new system.
- [ ] **Offer ongoing support and resources** to address any post-training questions or issues.
- [ ] **Collect feedback from users** to improve training materials and processes.

" Even though I consider myself to be quite an advanced user, I always benefit from the interactions I have with their experts. Their products are so powerful that there are always some tips & tricks or best practices that I had not yet discovered that make our lives easier.

– Tim Van Cleynenbreugel, Co-founder and CTO

Replasia

Go-Live and support

Duration: Ongoing (initial intensive support for 1-2 weeks)
Purpose: Ensure a smooth transition to the new system with ongoing support.

> **(?) Switching to Matrix Requirements?**
>
> Join the **SxMD Connect Community** to ask questions, submit feature requests, learn about interesting use cases developed by other Matrix users, and have discussions with other Medical Device software companies .

The go-live and support phase is fraught with potential challenges, including unexpected system issues and user adoption hurdles. Despite thorough testing, unanticipated problems can arise during the go-live phase, causing disruptions. Ensuring that users are adequately supported during the transition is crucial; resistance to change and unfamiliarity with the new system can lead to productivity drops despite thorough training sessions. Providing intensive support and addressing user feedback promptly is essential to mitigate these issues and ensure a smooth transition to the new ALM system.

Best practices

- [ ] **Develop a go-live plan** that includes a timeline, communication strategy, and contingency plans.

- [ ] **Provide intensive support during the initial go-live phase** to address any immediate issues.

- [ ] **Monitor system performance and user feedback** to identify and resolve any post-migration problems.

- [ ] **Offer ongoing support** through help desks, support tickets, and regular check-ins.

- [ ] **Continuously improve the system and support processes** based on user feedback and evolving needs.
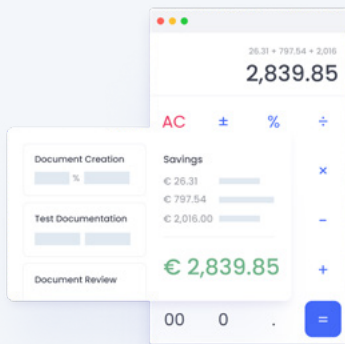
> " When we first started with MatrixALM, the Matrix Requirements team was a massive help. Whenever we had a question or needed support, they were extremely responsive—typically, we received answers in just 30 minutes!
>
> **– Erika Andreeto, Project Manager**
>
> TECRES

👍 The Matrix Requirements advantage

Migrating to an ALM that aligns with your business needs will help your company maximize ROI. Use our **ROI calculator** to see the potential financial benefits of your choice by switching to an ALM like **MatrixALM**.

Calculate savings

Control Medical Device design

Innovate faster with a flexible, item-based approach to documentation with up-to-date visibility into the latest status of your project to maximize productivity no matter the geographical location of team members.

Reach compliance with confidence

Save money by avoiding product delays, defects and rework. Visually see the trace-ability of your product in an actionable tree that highlights outdated or missing links no matter the complexity.

Accelerate time to market

Manage multiple variant products, branches and change management with a solution that keeps your team on-track and eliminates design inconsistencies.

Connect to all your essential tools

Integrate your best-in-class dev tools with **native integrations** for Jira, GitLab, GitHub, Azure DevOps and more and leverage our REST API to connect the rest.

Accelerate implementation with the Platinum Support package

Keep your team focused on innovation and leave the operational work to us by leveraging our platinum support team of industry experts and support engineers to get you set up in less time. The Platinum Support package ensures you get rapid, high-quality support to effectively configure and utilize your ALM. The Platinum Support package includes:

- Guidance on best practices
- Importing and converting data
- Audits of your matrix system for peace of mind that you've set up your system correctly
- Consulting
- Custom scripts creation
- Training of new users
- Complex report building
- API support
- And so much more

> "Getting started with MatrixALM was simple; the solution is very well-designed and easy to use. By building on project templates provided by Matrix Requirements, we were able to get up and running within just a couple of weeks.
>
> **– Jon Giambattista, Director of Software**
>
> **Limbus AI**

Conclusion

The time required for a migration depends heavily on the complexity of the existing ALM setup, the volume and quality of data, and the extent of required customizations and integrations. By following these steps you can streamline the transition process and ensure a successful migration to whichever ALM solution you choose.
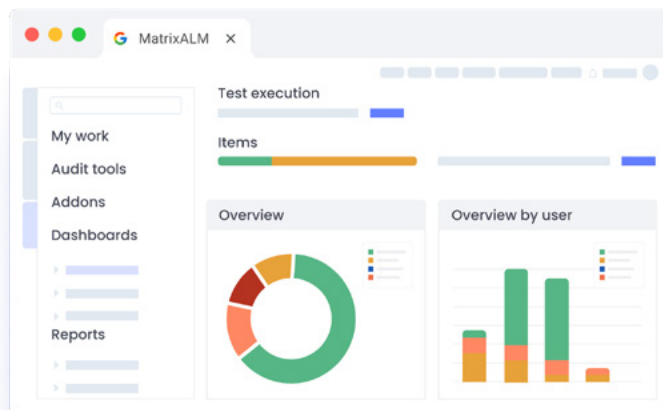
Book a demo

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Matrix Requirements GmbH is a global software leader helping innovative Medical Device companies remain focused on developing safer products faster. **MatrixALM** & **MatrixQMS** reduce the regulatory burden by bridging the gap between agile & compliance to ensure quality across the entire product lifecycle. Matrix Requirements is an **EN ISO 13485:2016** and **ISO/IEC 27001:2022** certified company.

matrixreq.com