SUBVERSION TO HELIX ENTERPRISE
MIGRATION PLANNING CHECKLIST

Subversion-to-Helix Enterprise migrations vary in scale and complexity. Many migrations are straightforward and can be self-service and completed in hours. For larger and more complex Subversion installations, migrations will take longer and a more formal approach is recommended.

Use this checklist to help you plan your migration from Subversion to Helix Enterprise.

☐ Select and train transition team
Your transition team is fundamental to getting your migration right. Transition team members should include software developers, your Subversion admin (or developers who act as admins), and, if possible, someone with Subversion-to-Perforce migration experience, such as a consultant or someone who’s made the move with another company.

☐ Plan your branching strategy
Determine whether the branching strategy that you used in Subversion is appropriate to use with Perforce. If not, decide on the strategy to use with Perforce.

☐ Select your migration approach
Determine what and how much history to import. This requires careful consideration, as you may have different approaches for different products. Migration options include Tips only, Detailed History Import (DHI), and Baseline and Branch Import (BBI).

☐ Determine your cutover strategy
Determine if a “grand opening” or “phased by team” cutover is more appropriate. The grand opening strategy cuts over everything at once, with all team members on Helix Enterprise, and is the recommended strategy if possible. If the grand opening strategy doesn’t work, perhaps due to large projects or individual team readiness, then the phased by team strategy is necessary.

☐ Identify your transition schedule
Determine when is the best time (over a weekend, when there are fewer projects in process, etc.) to execute a grand opening strategy. If phased by team, use the same considerations to prioritize and schedule team cutovers.

☐ Complete dry runs
Completing dry runs is essential for success. Dry run everything! Run full dry runs against various stresses and loads, test your backup systems, test integration with your developers’ tools, have developers run from their desktops, and so on. Look out for and address any data and/or process snags and make appropriate corrections.
☐ Get Helix Enterprise environment ready
Make sure everything migrated completely and the source code is verified in your Helix Enterprise system. Do any necessary re-tooling on your build systems, such as any custom automation that needs to be changed to talk to Helix Enterprise. Verify the build results – make sure you can do a build, complete a build, and run it through your test suites.

☐ Train users
Do as close to your cutover date as possible, but with a little bit of leeway in case any new or missed opportunities are brought up as a result of the training.

☐ Cut over to Helix Enterprise!
Start enjoying all the benefits of Helix Enterprise.