Pre-Data Migration Job Aide (Cheat Sheet)

1. Create the Agency's Membership Definitions in the AW-M AUI under the **Programs** tab.
   - Create Programs, Packages, and Options
   - Create agency waivers at the program level, if needed
   - Create custom form questions at the package level, if needed
2. Create a mapping between your current membership structure to the newly created Program, Package and Options in AW-M.
3. Plan the Migration Sessions before starting your first migration session. Migration Planning is essential to a clean and smooth data migration.
   - Group current memberships in separate migration sessions.
   - Each Migration Session should have at least 1 template file. Use a descriptive filename to denote the group in case you have to upload multiple template files for a migration session (each uploaded file might come from a different data source).
   - Each Migration Session should correspond to only a single Program-Package-Option binding. The number of Program-Package-Option combinations will dictate the minimum number of Migration Sessions required.
   - Each Migration Session should correspond to only one set of Activation Settings:
     i. Payment required
     ii. Form Questions answer required
     iii. Waiver Signatures required
   - Note on FAMILIES: Families that have purchased different types of memberships must be assigned to multiple Migration Sessions.
4. Clean up the migration data. Refer to the Data Migration Template User Guide document for guidance.

Sample Migration Planning Worksheet

Migration Session	Program	Package	Option	Payment	Form Questions	Waivers	Filename	Additional Notes
Adult Annual Group	Running	Adults	Annual	N	N	N	AdultsAnnualNNN41216.xls Adult AnnualNNN0413a6.xls	47 members
Adult Monthly Group	Running	Adults	Monthly	N	N	N	AdultsMonthlyNNN41216.xls	36 members
Adult Lifetime Group	Running	Adults	Lifetime	N	N	N	AdultsLifetineNNN41216.xls	12 members
Student Annual Group	Running	Student	Annual	N	N	N	StudentsAnnualNNN41216.xls StudentsAnnualNNN041316.xls	59 members
Sudent Monthly Group	Running	Student	Monthly	N	N	N	StudentsMonthlyNNN41216.xls	72 members
Seniors Annual Group	Running	Seniors	Annual	N	N	N	SeniorAnnualNNN41216.xls	21 members
Senior Lifetime Group	Running	Seniors	Lifetime	N	N	N	SeniorsLifetimeNNN41216.xls	16 members
Adults Annual Group 2	Running	Adults	Annual	Y	Y	N	AdultsAnnualYYY41216.xls	15 members

Senior Annual Group 2	Running	Seniors	Annual	Y	Y	N	SeniorsAnnualYYY41216.xls	24 members