BUTTERFLY

WHITE PAPER · SYSTEM MIGRATION

System migration: measurement, not guesswork.

The method Butterfly follows when moving off a work tracking, asset and maintenance or approval system: inventory first, then migration, then one-to-one verification against the old system and a gradual cutover.

Inventory
The documented, installed and actually used structure

Migration
Records, history and ways of working

Verification
Numerical comparison with the old system

Gradual cutover
Pilot, parallel run, cutover

EXECUTIVE SUMMARY

Replacing a system means moving the work that actually lives in it without loss.

Before you switch off the old tool's license, replacing a system means finding the work that actually lives in that tool and moving it to its new home without loss. What makes a migration risky is usually not the technology but deciding by guesswork what needs to be moved.

Over the years, fields, rules, add-ons and connections pile up in work tracking, asset and maintenance or approval systems. Some are used every day, some have not been opened for years. If the migration plan is made without knowing this difference, either unused structure is moved or a step that is in use gets lost.

Butterfly runs migrations by measurement: it reads the structure and usage data of the source system, lists the scope to be moved in writing, compares the migrated data with the old system using numerical criteria and cuts over only after a pilot and a parallel run. Butterfly does not have to replace your existing systems; it can be installed on top of them and manage the work between them, and replace these tools if needed.

IN THIS DOCUMENT

- The hard parts of a migration and our answer to each
- A four-step method and what is measured at each step
- What is migrated, what is rebuilt and what stays out of scope
- Integrations: same API, new address
- Two migrations from the field: our own work tracking system and an asset and maintenance system in manufacturing
- A readiness checklist, certificates and frequently asked questions

OUTCOME

Measure first, then migrate. The migration closes with measurements that match the old system one to one.

THE HARD PARTS OF A MIGRATION

Known risks, measured answers.

The five concerns we hear most often in migration discussions and our answer to each.

CONCERN	WITH BUTTERFLY	OUTCOME
We do not know exactly what we will move.	**We measure first.** We read the source system's structure and usage data and compare the documented, installed and actually used structure.	**Unused structure is not moved; hidden scope becomes visible from the start.**
Our license is expiring and time is short.	**We split the migration into phases.** We try the riskiest process first in a pilot with a small team, then move over gradually.	**Even under schedule pressure, no irreversible step is taken without control.**
We depend on the vendor for every change.	**We leave changes to you.** Process steps, approval rules, forms and permissions are kept as data in the platform; a change is configuration, not software.	**The process owner makes changes on their own schedule.**
Half of the work runs in e-mail.	**We bring the steps in e-mail back into the process.** Steps that spill over into e-mail, such as additional documents and additional approvals, are added to the flow with a rule table.	**Off-record work returns to the record; the audit trail is complete.**
We cannot change everything at once.	**We run both systems together for a while.** Butterfly runs on top of existing systems; during the migration the old and new systems work integrated or in parallel.	**Change becomes a controlled configuration, not a one-off project.**

WHEN MOVING OFF AN APPROVAL OR BPM SYSTEM

With approval tools whose forms are fixed, the process spills over into e-mail. In Butterfly, approval steps, forms and permissions are kept as data; additional approval and additional document steps that spilled into e-mail are brought back into the process with a rule table. Approval and BPM migrations follow the same method: a measured inventory, a pilot, a gradual cutover.

IT DOES NOT HAVE TO REPLACE ANYTHING

Moving to Butterfly does not require replacing all your systems. Butterfly can be installed on top of existing systems and manage the flow, rules and visibility between them. When replacing a system is the goal, it is done with a measured inventory and gradually.

METHOD

Measure first, then migrate.

Every migration follows the same order; no irreversible step is taken without control. What will be measured at the end of each step is written down before the step begins.

1 · INVENTORY

Measure and list

The source system's structure and real usage are read; the target design is drawn up.

2 · MIGRATION

Transfer and rebuild

Records and history are transferred; workflows are built in Butterfly.

3 · VERIFICATION

Compare

Numerical criteria are placed side by side in the old and new systems.

4 · GRADUAL CUTOVER

Pilot and cutover

Pilot, parallel run, cutover and freezing of the old system.

What is measured at each step?

STEP	WHAT IS DONE	WHAT IS MEASURED
Inventory	Which system is being replaced and why; process owners and the decision maker are identified. The documented, installed and actually used structure is compared. The target design produces the data model, state machines, integrations and a list of open questions with blockers marked.	**Structure: projects, fields, workflows, scripts, integrations, permissions. Usage: record volume, flows that actually run, API endpoints actually in use.**
Migration	Records, comments, attachments and change history in scope are transferred. Statuses, transitions and approval rules are built in Butterfly's process engine.	**Record counts in source and target; the status of every item on the written scope list.**
Verification	The same questions are asked of the old and new systems and the results are placed side by side. The migration closes with a quality control test report.	**Record counts, total durations, open item counts; the result of every scenario in the test report.**
Gradual cutover	The riskiest process is tried in a pilot with a small team using the organization's data. The old and new systems run integrated or in parallel for a while. At cutover the last differences are transferred and the old system is frozen and shut down.	**The pilot's closing criterion written in advance; the last differences transferred at cutover.**

WHAT THE ANALYSIS NEEDS

Read-only access to the source system or database, or a representative export, real usage data, existing documentation if any, and short interviews with process owners. No live changes are made to the existing system.

SCOPE

What we migrate, what we rebuild, what we leave behind.

The output of the inventory is a decision written next to each component. Scope is discussed over this list; there are no surprises after the migration.

MIGRATED

Records and history

Projects and work items, asset records, comments, attachments, time entries, sprints, boards, saved filters and change history.

REBUILT

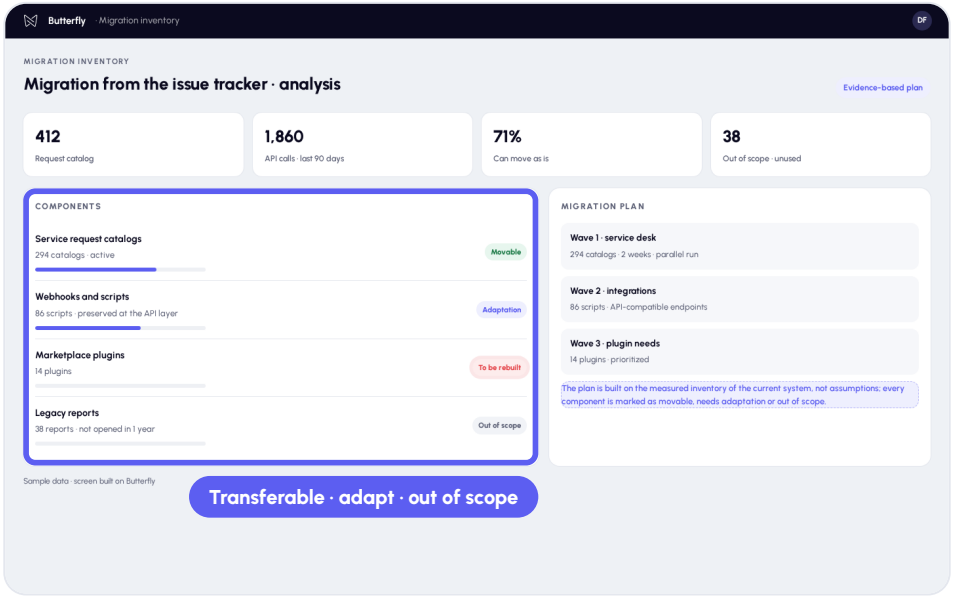
Rules and functions

Statuses, transitions and approval rules are built in the process engine. The functions of marketplace add-ons that are actually used are rebuilt in Butterfly.

OUT OF SCOPE

Unused structure

Unused structure is not migrated. Very high-volume technical transaction history, if needed, is left accessible in an archive instead of being moved to the new system.



Migration inventory. Each component is marked as transferable, adapt, to be redeveloped or out of scope; the migration plan is split into waves. Sample screen built on Butterfly; the numbers are sample data.

LIMITS ARE STATED UP FRONT

- Marketplace add-ons do not come over one to one; the functions actually used are identified and the ones needed are rebuilt on Butterfly.
- Which features come over one to one, which will be rebuilt and which stay out of scope are listed in writing before the migration.
- Which data stays in which system is decided before the migration.

INTEGRATIONS AND WORKFLOWS

Same API, new address.

The question asked most often in a work tracking migration is what will happen to existing scripts and connections. In TaskFlow, the answer is a compatible API layer.

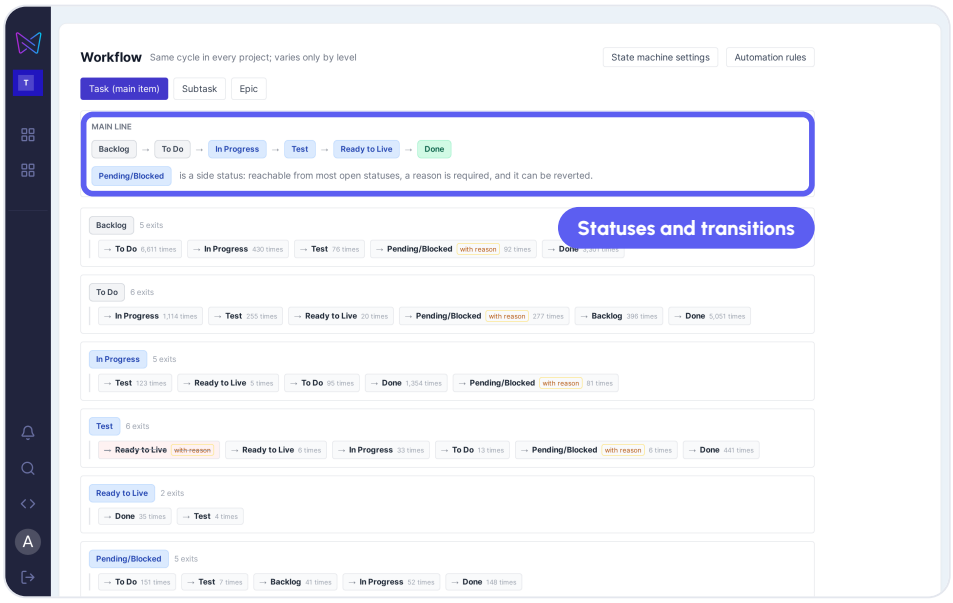
TaskFlow provides an interface that works with the same paths and parameters as the REST APIs of common work tracking tools: REST API v2 and v3, agile board and sprint endpoints, service desk endpoints. Webhooks are sent signed (HMAC). Authentication uses e-mail and an API key or a personal access token. In most cases, scripts and reporting connections that use the supported endpoints keep working once only the address and access key are changed.

Verified from the inventory

API version, authentication and webhook usage are verified one by one from the inventory; critical integrations are tested with your own scenarios before the migration. For asset and maintenance or approval systems, ERP, identity and reporting connections are listed with data direction and frequency.

Not supported

In-app OAuth 2.0 (3LO) connections are not supported; authentication uses an API key or a personal access token.



Workflow. The transitions allowed from each status; a reason is mandatory when work is put on hold. From our own TaskFlow installation.

WORKFLOWS ARE REBUILT, RULES ARE RECORDED

- In our own migration the workflow was built in the platform's process engine: 11 statuses, 46 transitions.
- A reason is mandatory when work is put on hold; the cause is asked for when effort is exceeded.
- 108 automation rules were migrated; the trigger and run count of every rule are tracked in a single table.

FROM THE FIELD 1 · WORK TRACKING

We moved our own work tracking system in a single day.

The team that builds Butterfly moved its entire work tracking tool to TaskFlow on the same day, including attachments and change history.

89

projects moved on the same day; cutover, transfer of the last differences and freezing of the old system were done on the same day

32,130
work items

34,112
time entries

667,864
change history records

8/8
measurements matched exactly

The migration was closed with measurement.

Once the move was complete, eight measurements were placed side by side with the source system. All eight matched exactly.

MEASUREMENT	SOURCE SYSTEM	TASKFLOW
Items in the active sprint	934	934
Subtasks	721	721
Open work	428	428
Work on hold	54	54
Effort breakdowns (4 measurements)	exact match	exact match

- The 48 features the team actually used in the source tool were compared one by one: 43 are ready, 3 are partly ready and 2 are out of scope.
- The migration was closed with a quality control report of 69 tests.

Source: Butterfly TaskFlow White Paper. Since the migration, the sprint closing report is prepared automatically, and every hold and overrun reason in the workflow is recorded.

FROM THE FIELD 2 · ASSETS AND MAINTENANCE

A controlled exit from an asset and maintenance system in manufacturing.

At an organization in the manufacturing sector, the asset and maintenance process was locked in an expensive and inflexible system. Breakdown and work requests were disconnected from asset history; periodic and meter-based maintenance depended on individuals keeping track.

Asset records, maintenance definitions and the history of about 24,000 work orders were moved from the old system. Periodic maintenance, breakdown reporting and work request modules are running in production.

~55,000 assets moved from the old system and managed on one platform

What was migrated, what was rebuilt?

TOPIC	IN BUTTERFLY
Asset records	Transferred from the measured inventory together with serial number, manufacturer, location and request history; assets were grouped.
Periodic maintenance	The system produces the 12-month rolling plan; tasks are opened weekly and assigned to the owner. If the approver rejects, the task returns to the owner.
Meter-based maintenance	For equipment tied to operating hours the threshold is calculated; if maintenance is not needed, the task closes on its own.
Breakdowns and work requests	Breakdown, maintenance and change requests are classified and enter the same flow.
Site visit	Maintenance steps are ticked, materials used and measurements are entered; the task cannot be sent for approval until it is complete.
ERP and permissions	Material and cost reports come from the ERP; permissions are defined per screen and per operation.

The limit was stated up front

Material usage is kept in the maintenance record for information; stock movements stay in the ERP.

After the migration

When a maintenance rule changes, no software project is opened; the process owner makes the change on their own schedule.

ARE YOU READY?

How ready is your organization for migration?

Eight questions, four topics: data, connections, verification, team and cutover. The right-hand column shows what is needed to count as ready on that question.

	TOPIC	QUESTION	TO COUNT AS READY
☐	DATA	**Has an inventory of the data to be migrated been taken?**	Counts, relationships and usage data are documented.
☐	DATA	**Has it been decided how much historical data will be migrated?**	The scope and archiving rule are written down.
☐	CONNECTIONS	**Do you know the add-ons and customizations in the current system?**	A list exists, and the new equivalent of each has been decided.
☐	CONNECTIONS	**Are the other systems the current system depends on known?**	A list exists; data direction and frequency are documented.
☐	VERIFICATION	**Is there a defined criterion for the migration to count as successful?**	Numerical criteria are written down (record counts, totals).
☐	VERIFICATION	**Is there a pilot plan with real users?**	The pilot team, duration and closing criterion are set.
☐	TEAM AND CUTOVER	**Are the process owners known?**	The owners are known and have set aside time for testing.
☐	TEAM AND CUTOVER	**Are the cutover date and rollback plan ready?**	The cutover date, parallel run and rollback plan are written down.

Score yourself

For each question, score the answer closest to your situation from 0 to 3: 0 if nothing has started, 3 if the state in the right-hand column is met. Divide the total by 24 and multiply by 100.

75 and above

Ready to migrate

The basic preparation is done. You can start the migration with a pilot and proceed gradually.

45 to 74

Halfway there

A large part of the preparation is in place; do not set a cutover date until the gaps are closed.

Below 45

Preparation needed

Measurement should come first. All the gaps are closed in the first two steps of the method.

TRUST

Data stays under the organization's control throughout the migration.

The analysis is done with read-only access; no live changes are made to the existing system. Migrated records are kept in Butterfly under the platform's permission model and audit trail.

On-premise deployment

Butterfly runs on the organization's own servers; the organization decides where data resides.

Private cloud

In a cloud environment dedicated to the organization, with the same permission and audit model.

Air-gapped network

A deployment option that can run in environments closed to the internet.

Permissions and audit trail

Role-based access; permissions per screen and per operation. Change history comes over with the migrated record.

IF YOU DECIDE NOT TO MIGRATE

After the analysis you are left with a complete and up-to-date description of your application: a capability inventory, process flows with their real exceptions and proven pain points. This document can be used regardless of the migration decision.

Certificates

CERTIFICATE	SCOPE
ISO/IEC 27001	Information security management system
ISO 9001	Quality management system
Domestic Product Certificate (Yerli Malı Belgesi)	Business process management software (Butterfly), 100% domestic content, class A, high technology
Technological Product Certificate	Butterfly DXP, Ministry of Industry and Technology of the Republic of Türkiye

All certificates and verification links: butterfly.dev/en/kurumsal/sertifikalar

FREQUENTLY ASKED QUESTIONS

Short answers about migration.

Do we need to replace all our systems?

No. Butterfly can be installed on top of your existing systems and manage the flow, rules and visibility between them. If you want to replace a system, it is done with a measured inventory and gradually.

Are our historical records migrated too?

Yes; work history, comments, attachments, time entries and change history can be migrated. Very high-volume technical transaction history, if needed, is left accessible in an archive instead of being moved to the new system.

Will our existing integrations keep working?

In a work tracking migration, for integrations that use the supported endpoints, changing the address and access key may be enough. API version, authentication and webhook usage are verified one by one from the inventory.

What happens to the add-ons we use?

Marketplace add-ons are not transferred directly. The add-on functions actually in use are identified, and the ones needed are considered for rebuilding on Butterfly.

How long does a migration take?

It depends on record volume, workflows and existing integrations. In the first evaluation we decide together which parts will be migrated, which will be rebuilt and which will stay out of scope.

Let's start the migration plan with measurement.

In a discovery meeting, let's talk about your current system and your priority process, and decide together which records will be migrated, which connections will be tested and which rules will be rebuilt in Butterfly.

Request a migration analysis · butterfly.dev