

Data Migration Best Practices

Data migrations are risky endeavors by nature and typically scrutinized by many business units within an organization. Despite various interests, all business units want to ensure that the data is retained in its original, unaltered format. More specifically, all content and metadata must remain unchanged, and detailed reporting should be provided to ensure this requirement is satisfied.

For example, if an organization is under the mandate of federal regulators, such as the SEC or FINRA, the compliance department will require assurances that supervisory data is maintained in its original disposition. The legal department will want accurate reporting that sufficiently demonstrates the chain of custody of the data during the migration. When this data is being migrated between dissimilar archiving systems, the level of detail required for a successful outcome increases even more. Therefore, it is no surprise that these projects tend to scare organizations away from completing them on their own, because there is a high risk factor if the migration is not done correctly, using the right tools.

Considering the possible business, financial and legal consequences of a poorly executed migration, it's imperative to have a clearly defined plan and, whenever possible, assistance from a migration expert. There are also steps that organizations can take before, during and after a migration to reduce risk, lower costs and complete their migrations more quickly.

Before Migration

- Identify a best-of-breed migration vendor to guide the organization through the migration process. Some of the skills and tools required to properly migrate archive data are very specialized, and internal resources may not have the requisite knowledge and expertise to facilitate a smooth migration.
- Perform a review of data classification and retention standards. A data migration is the perfect catalyst to spend time confirming that data is being retained for the correct time period. By reviewing standards before migrating, organizations can potentially perform some cleanup, saving on migration time, migration costs and storage costs associated with the data. If there are any other third-party vendors engaged in the data migration process, make sure to ask how they will maintain these data classifications, and work with the migration specialist to make any required modifications to the procedures to support the organization's policies.
- Decide how to integrate the migration with other critical legal, compliance and/or IT initiatives. Design a data map to show where various stakeholders, such as internal compliance reviewers, can retrieve their data based on the migration project timeline. Also, make sure that procedures are clearly defined.
- Communicate with end users and other stakeholders, informing them of the migration, what impacts to access and performance they can expect during the migration as well as the potential benefits of the migration.
- Find out from the organization's legal and compliance departments how to handle special circumstances, such as items on legal hold, belonging to terminated users or that cannot be migrated for various reasons.
- Confirm that the legacy systems are in good working order and support contracts are in place to handle any issues found during the migration.
- Define a cutover date, when the legacy systems will no longer receive data, and then perform a full backup of the environment to protect against a system failure.

- During the implementation and testing phases of the migration process, thoroughly review and test the procedures the migration specialist puts in place, and review the success criteria to ensure that all goals and milestones are met. Document any issues and escalate them to the migration specialist for resolutions or alternative options. Data migrations are not “one size fits all.” Vetting and modifying migration plans before the first production data is migrated will save time, money and headaches down the road.

During Migration

- Communicate to end users and other stakeholders when their data is migrating to increase awareness and prevent unnecessary support/helpdesk tickets from being opened.
- Expect regular reports from the migration vendor and the organization’s IT team regarding the migration completion, including issues discovered, issues resolved, migration performance and end user experiences. Suggest regular status meetings if the migration vendor does not.
- Avoid changing the environments during the course of the migration. This includes architectural as well as content changes.
- Allow time for regular backups of environments, which may require pausing migrations.
- Inform the migration vendor of any regular maintenance windows or emergency outages that may impact the migration.

After Migration

- Review all chain of custody reports, paying special attention to items that failed to migrate. Work with the migration vendor to determine whether these failed items can be captured or migrated by some other means, and document what is missing and why it could not be migrated for the organization’s compliance and legal departments. Save these documents and reports until the retention period for the failed items expires.
- Let the migration vendor know when the organization accepts the migration or what is outstanding that is preventing acceptance of the completed project.
- Delete the original data as well as any backups of the original data, unless the organization’s legal department provides instruction to the contrary.

Large-scale data migrations can be challenging, but with the appropriate planning—and through careful execution of that plan—organizations can greatly reduce the risks and costs associated with these projects.

Globanet has developed these best practices based on more than 10 years of executing archive migrations for its customers, having done more archive migrations than any other vendor globally, and continues to be the leader in this field. Globanet has also developed proprietary migration methodologies to reduce risk, timeframes and complexities of archive migrations.

About Globanet

*Globanet is a leading provider of archiving and ediscovery solutions worldwide. Founded in 1996, the company is a pioneer in archiving and intelligent information governance, and has developed a portfolio of software and services to help organizations manage data from creation to expiry. Globanet’s proprietary solutions include the Merge1 message capture platform and Migrate (formerly GEM) data migration software. A Symantec Platinum Partner with Master Specialization in Archiving and eDiscovery, its professional services team has extensive experience with industry-leading Enterprise Vault and Clearwell. Globanet’s broad range of services includes policy and solution design, installation and configuration, data migration, custom add-ons and project-based ediscovery consulting. For more information, call **888.427.5505** or visit www.globanet.com. Visit the Globanet Blog at <http://www.globanet.com/blog> or follow us on Twitter at <http://twitter.com/globanet>.*



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